Canadian Mental Health Association
Calgary
Mental health for all

Efforts To Outcomes (ETO)
USER MANUAL

Community Transitions Team: Peer Options, Continuing Connections, and Leisure Recreation Programs

Created in September 2012

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INTRODUCTION

Welcome to ETO!

ETO is a case management software for social services developed and maintained by the company Social Solutions based in Baltimore, United States. ETO helps nonprofit organizations quickly and easily track efforts (Staff and Client activities), outcomes (surveys and questionnaires), and the progress of clients in their efforts.

To access the ETO database, type in the following address: **http://cmhacalgary.etosoftware.ca**
Your Username is your CMHA e-mail address (or if you don't have one, use your personal e-mail address that you provided to CMHA). Once you are given an initial password, the new password that you will set up will be of your own choosing, but it has to have a minimum of 6 characters and include at least one numeric character.

Peer Options and Leisure Recreation Program Staff have access to their own Programs as well as all the Supportive Living and Outreach Services Programs. This will allow for continuity and seamlessness of services between the Programs.
Continuing Connections Program Staff have access to their Program, as well as the Peer Options and Leisure Recreation Programs.

The Peer Options Program has a Waitlist Program and the vast majority of clients will first be in this Program and then enrolled in the Actual Peer Options Program when they have been accepted The Continuing Connections Program and the Leisure Recreation Program do not have a Waitlist Program. The Leisure Recreation Program will only 'enroll' (and not 'add') clients because all of their clients are already or have been in a CMHA Program.

There are a lot of common elements among your Programs, which is why only one Manual has been developed for all your Programs. However, the differences between your Programs are taken into consideration and are highlighted.

One of the main distinctions of the Leisure Recreation Program is that it does not have registered clients in their groups; attendance is taken for the clients who are registered in the Leisure Recreation Program.

Please contact your ETO Administrator (CMHA Outcomes Measurement Coordinator or Director of Client Services in the absence of the Outcomes Measurement Coordinator) if you have any questions regarding ETO. You can also access the **Help** section in the database, or you can contact the ETO customer support at support@socialsolutions.com or at 1- 866.732.3560 extension 2

Best wishes for your successful use of ETO!

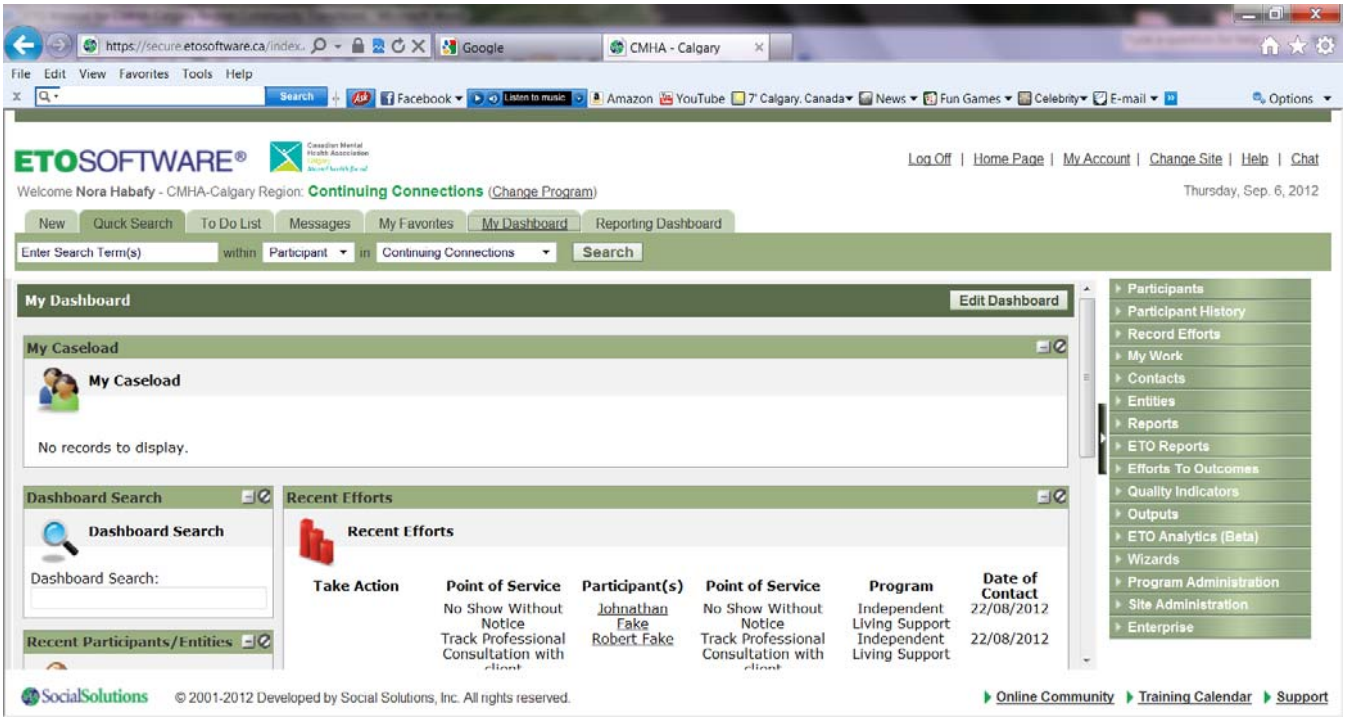
NAVIGATING ETO

There are a variety of ways to move through ETO Software.

1 **My Dashboard**
2 **Quick Tab Navigation**
3 **Custom Home Page Links**
4 **Navigation Bar**

It's up to you to decide which navigation method is the most comfortable based on your use of ETO. The ETO Administrator may prefer a method or combination of methods and train you accordingly.
Follow the links below to learn more about each.

My Dashboard


ETOSOFTWARE®
Log Off | Home Page | My Account | Change Site | Help | Chat
Welcome Nora Habafy - CMHA-Calgary Region: Continuing Connections (Change Program)
Thursday, Sep. 6, 2012
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Enter Search Term(s) within Participant in Continuing Connections Search
My Dashboard
Edit Dashboard
My Caseload
No records to display.
Dashboard Search
Dashboard Search:
Recent Efforts
Take Action | Point of Service | Participant(s) | Point of Service | Program | Date of Contact
No Show Without Notice | Johnathan Fake | No Show Without Notice | Independent Living Support | 22/08/2012
Track Professional Consultation with | Robert Fake | Track Professional Consultation with | Independent Living Support | 22/08/2012
Recent Participants/Entities
Participants
Participant History
Record Efforts
My Work
Contacts
Entities
Reports
ETO Reports
Efforts To Outcomes
Quality Indicators
Outputs
ETO Analytics (Beta)
Wizards
Program Administration
Site Administration
Enterprise
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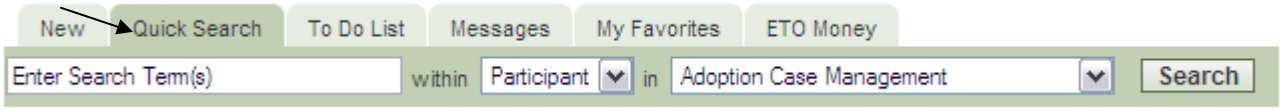
Online Community | Training Calendar | Support

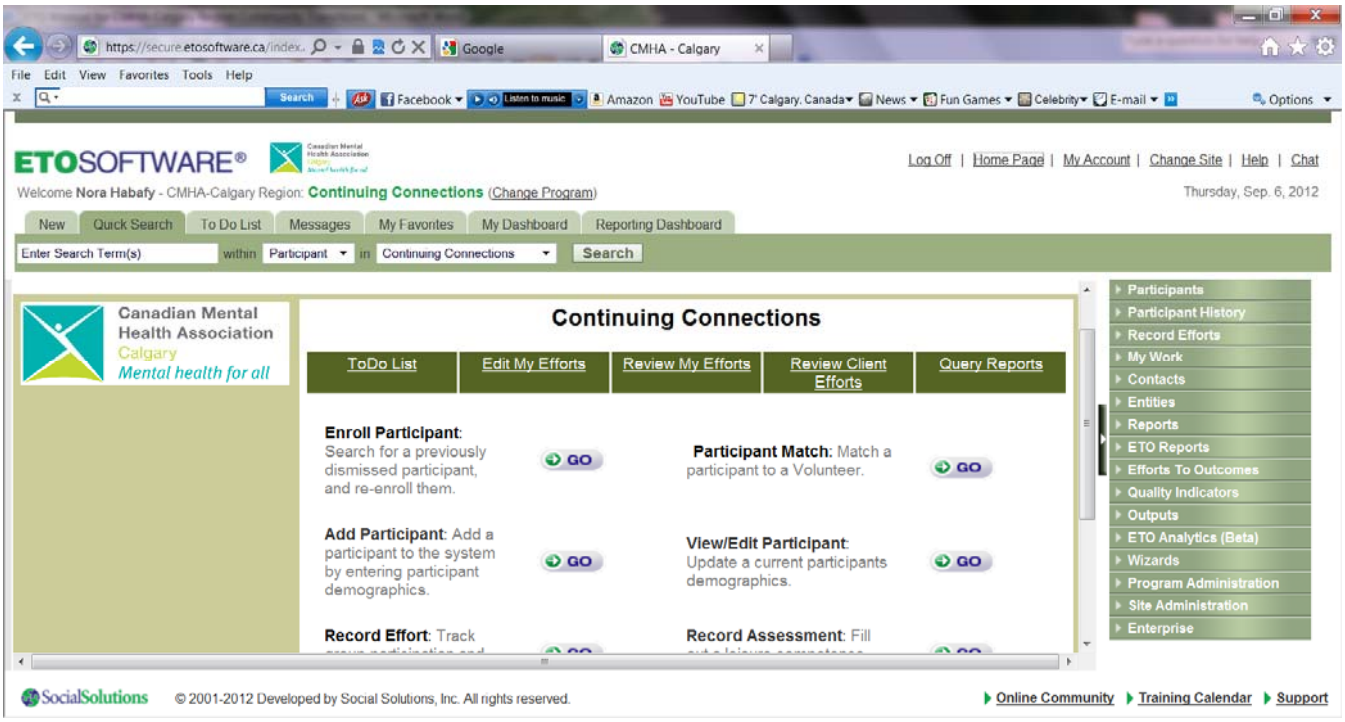
My Dashboard includes details of the work you have recently entered into ETO (Efforts, Assessments, Referrals). It may also include My Caseload, a search feature, reports, etc.

Quick Tab Navigation



The green tabs across the top of the screen are referred to as Quick Tabs. Quick Search is the most frequently used tab. Enter in a Participant's First or Last Name into the "Enter Search Term(s)" box and click the Search button. Click on a name in the search results to access a list of features to work on with that Participant.

Custom Home Page Links


ETOSOFTWARE®
Log Off | Home Page | My Account | Change Site | Help | Chat
Welcome Nora Habafy - CMHA-Calgary Region: Continuing Connections (Change Program)
Thursday, Sep. 6, 2012
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Enter Search Term(s) within Participant in Continuing Connections Search
Canadian Mental Health Association Calgary
Mental health for all
Continuing Connections
ToDo List | Edit My Efforts | Review My Efforts | Review Client Efforts | Query Reports
Enroll Participant: Search for a previously dismissed participant, and re-enroll them. GO
Participant Match: Match a participant to a Volunteer. GO
Add Participant: Add a participant to the system by entering participant demographics. GO
View/Edit Participant: Update a current participants demographics. GO
Record Effort: Track
Record Assessment: Fill
Participants
Participant History
Record Efforts
My Work
Contacts
Entities
Reports
ETO Reports
Efforts To Outcomes
Quality Indicators
Outputs
ETO Analytics (Beta)
Wizards
Program Administration
Site Administration
Enterprise
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Links to features can be added to the Home Page by the ETO Administrator.

Navigation Bar

The green bar on the right side of the page is referred to as the Navigation Bar. Click on any of the headers (in white font) to access features that fall in that section.

RECORDING A NEW CLIENT IN WAITLIST (PO) OR ACTUAL PROGRAM (Continuing Connections Program)

Participant – Member of the target population, recipient of service. For CMHA: Participant = registered client.

Participant in the context of ETO: "Most of our participants will go through the same process, beginning with an intake and finishing with an exit interview."

Search ETO first to avoid Duplicates!

Searching is probably the most frequently used functionality in ETO Software. Before a new Participant is added to the system, it is recommended that the system is searched to avoid duplicate entries

Quick Search

Quick Search allows you to search for active Participants in the selected program, or those who are active and dismissed across the entire site. Ensure that you select 'CMHA Calgary Region' when you do the search.

*****Brand new clients = not a CMHA client that is, a self-referral or an external referral*****

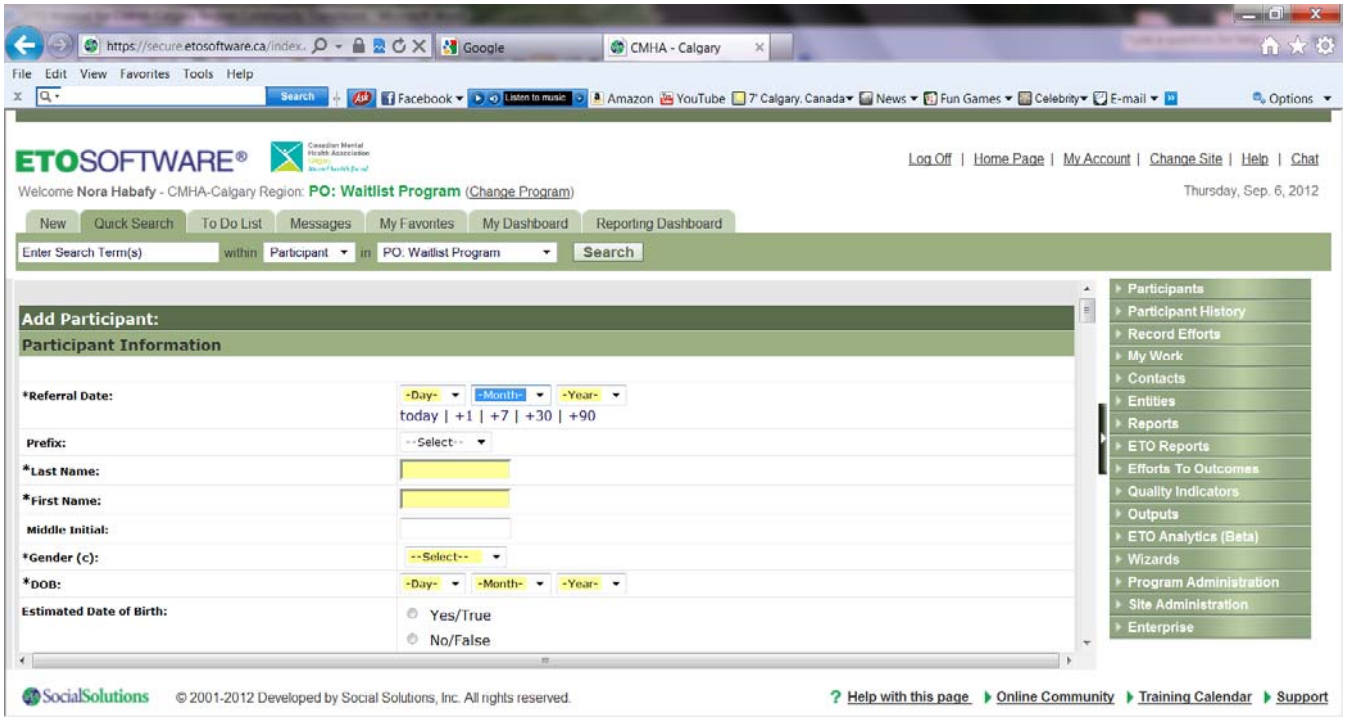
After you have searched ETO and did not find the client, you will have to **Add** the brand new client.

Add - Entry of data that is not already existing in the database (e.g.: Add Participant, Add Referral, Add Reliable Contact, Add Participant Match)

To add a Participant:

- Click on Go next to 'Add Participant' on the Intake Program's Home Page, or
- Click on 'Participants' and then on 'Add New Participant' on your Navigation Bar to the right

This page will appear.



The Add New Participant screen is how a record is started for a participant within the selected program. After this screen is submitted, additional types of data, such as Assessments, Efforts (Points of Service), and Referrals, can be attached to the record.
The Demographics seen on this screen are a combination of Standard fields that come with the software, and Custom fields that were set up based on our organization's needs. Custom Demographics can be edited by the ETO Administrator; Standard Demographics are hard coded and cannot be modified.
Demographics may vary from program to program, although some fields (including all Standard Demographics

and all Custom Demographics built with the Scope of Site), will appear in all programs.

Data Entry:

- Use the tab key or the mouse/track pad to move from field to field
- Asterisks (and yellow) indicate which fields are required (when a field is required, the user will not be able to submit the record without completing the required information).
- Do not use the back button or enter keys

Understanding Demographic Fields:

- "Case Number" is automatically generated *after t*he demographic page is submitted/saved.
- Phone numbers require 10 digits. Enter 10 digits, move to another field, and the number will auto-format with parenthesis and a dash.
- Postal Code will auto-populate city and province *after* the page is submitted.
- The Standard Demographics Referral Source and Funding Source are both a special type of field called Entity Cross Reference. New options can be added through the Add New Entity feature. Select the corresponding Entity Type (Referral Source or Funding Source) based on the field you're populating. If there are Entities in other programs in the site that should be listed in the current program, they can be brought into the program through Enroll Entity.
- The Alert field (if enabled) will generate a pop-up with the data entered in that field when the participant is accessed through View/Edit Participant, Participant Efforts and Enroll Participant.

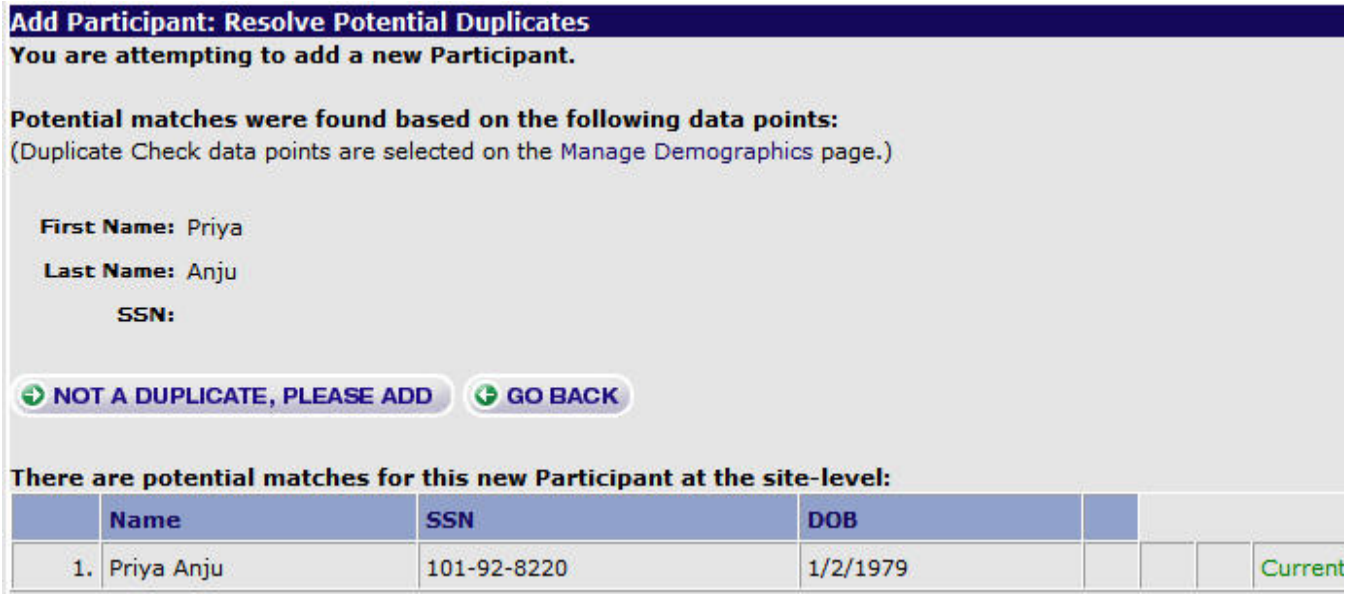
Submitting the Add New Participant Page:

- Once you've completed all relevant demographic information on the first page, select the Participant's Program Start Date at the bottom of the page. This date should be the date when the Participant started receiving services or completed an intake form. The Program Start Date can be backdated as necessary. Only the ETO Administrator can edit this date, please enter it carefully. This date default to blank.
- The Enroll in Program check box must be checked to enroll the participant in the program. The box will be automatically selected. If this box is not checked, the Participant will exist in ETO with no program affiliation. You will then have to use the Enroll Participant feature to pull the participant into the selected program. We would like to avoid this.
- Click Submit at the bottom of the page to save the record. A confirmation will appear to let you know that the Participant has been successfully added to the Program. Click OK to move to the next screen, which is defined by the ETO Administrator on a program by program basis.

Duplicate Alert

If you submit the new Participant's name and it matches another Participant in the Software, you will get a Resolve Potential Duplicates alert. **It is very common for staff to be confused by this message, as it is not expected!**

A list of possible matches of existing records will appear. The Duplicate Alert includes the following options:

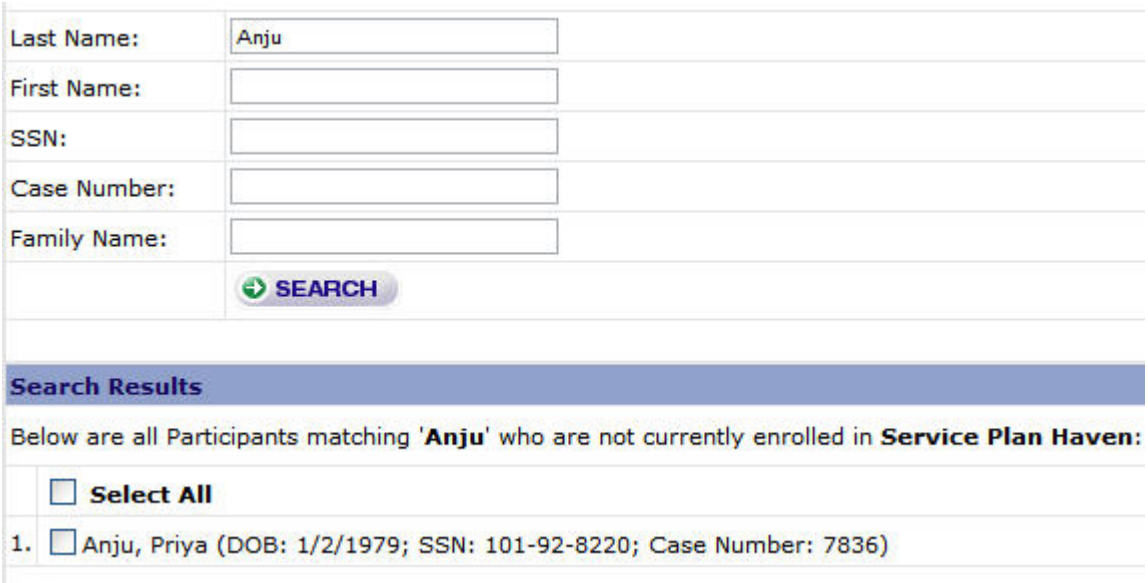


1. If not a duplicate: Click on **Not a duplicate, please add** which will add the participant as a new record

2. If a duplicate: Click on **Go Back** to the demographics and edit the record you are trying to add so that it will no longer match an existing record.

If a duplicate is already enrolled in the program, the record will say Currently Enrolled in green.

If a duplicate is not enrolled in the program (but exists in the CMHA-Calgary Region site), click on the **enroll option**: this will redirect you to the Enroll Participant feature, where you will need to search for the Participant.



If participant records are duplicated, it's not the end of the world! The records can be merged by the Site Administrator with the Duplicated Participants feature.

After submitting the Add New Participant page, you will be directed to another page, based on how your ETO Administrator has customized your system using either feature.

EDITING CLIENT INFORMATION

Feature to use: View/Edit Participant

View/Edit Participant is a program specific search; you can search for both active and dismissed participants. When you have done the search, click on a Participant to view his demographics, and make changes if necessary.

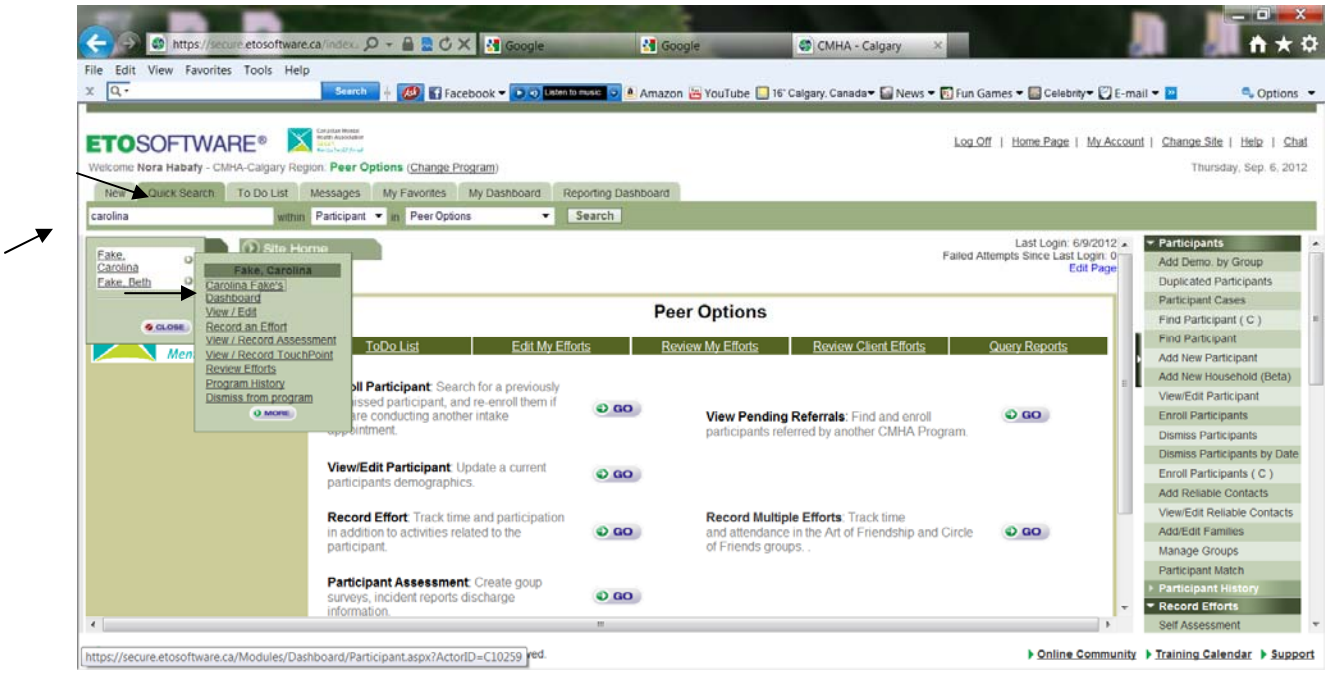
To View/Edit Client Information:

- Click on Go next to View/Edit Participant on your Program's Home Page, or
- Click on 'Participants' and then 'View/Edit Participant' on your Navigation Bar.

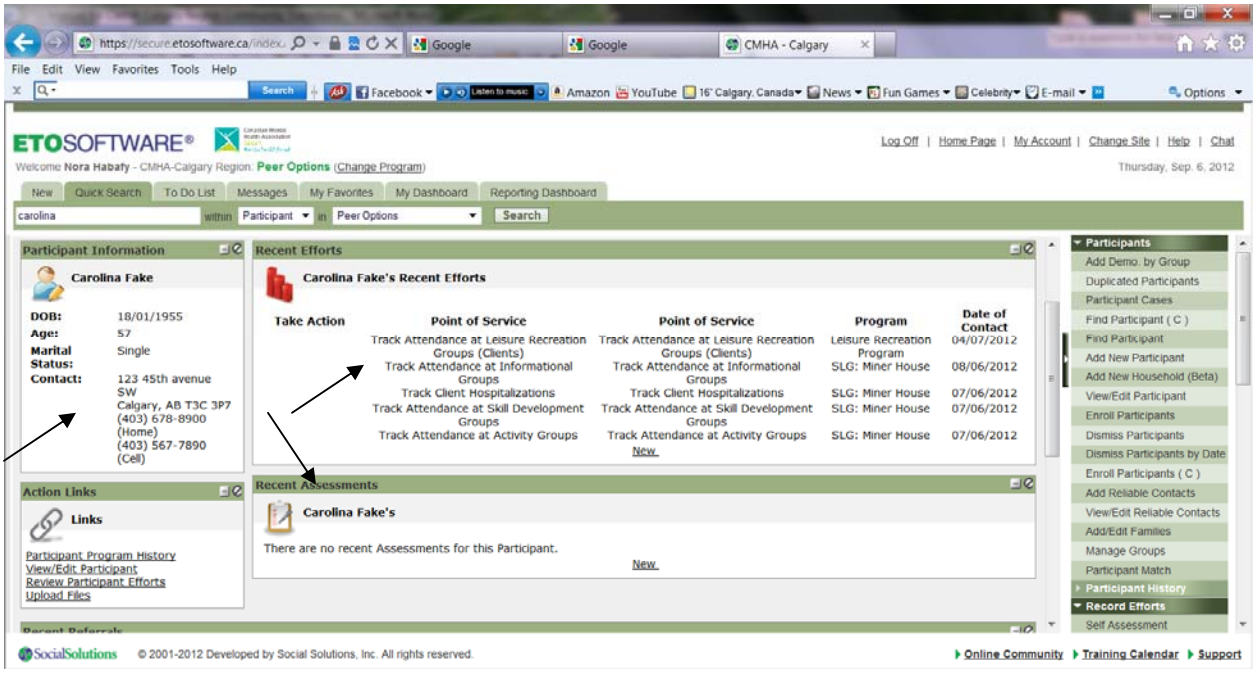
View and/or edit the information and then click on 'Submit'

PARTICIPANT DASHBOARD FEATURE

The Participant Dashboard is a link to have quick access to your client's file.
To access your client's dashboard, do a quick search and then click on the client's name and on the client's dashboard.



This is a Participant Dashboard. Through this dashboard, you can view your client's demographic information as well as his/her recent activities/attendances and assessments (tests).


ETOSOFTWARE®
Welcome Nora Habafy - CMHA-Calgary Region: Peer Options (Change Program)
Participant Information
Carolina Fake
DOB: 18/01/1955
Age: 57
Marital Status: Single
Contact: 123 45th avenue SW
Calgary, AB T3C 3P7
(403) 678-8900 (Home)
(403) 567-7890 (Cell)
Recent Efforts
Carolina Fake's Recent Efforts
Take Action | Point of Service | Point of Service | Program | Date of Contact
Track Attendance at Leisure Recreation Groups (Clients) | Track Attendance at Leisure Recreation Groups (Clients) | Leisure Recreation Program | 04/07/2012
Track Attendance at Informational Groups | Track Attendance at Informational Groups | SLG: Miner House | 08/06/2012
Track Client Hospitalizations | Track Client Hospitalizations | SLG: Miner House | 07/06/2012
Track Attendance at Skill Development Groups | Track Attendance at Skill Development Groups | SLG: Miner House | 07/06/2012
Track Attendance at Activity Groups | Track Attendance at Activity Groups | SLG: Miner House | 07/06/2012
New
Recent Assessments
Carolina Fake's
There are no recent Assessments for this Participant.
New
Action Links
Links
Participant Program History
View/Edit Participant
Review Participant Efforts
Upload Files
Participants
Add Demo. by Group
Duplicated Participants
Participant Cases
Find Participant (C)
Find Participant
Add New Participant
Add New Household (Beta)
View/Edit Participant
Enroll Participants
Dismiss Participants
Dismiss Participants by Date
Enroll Participants (C)
Add Reliable Contacts
View/Edit Reliable Contacts
Add/Edit Families
Manage Groups
Participant Match
Participant History
Record Efforts
Self Assessment
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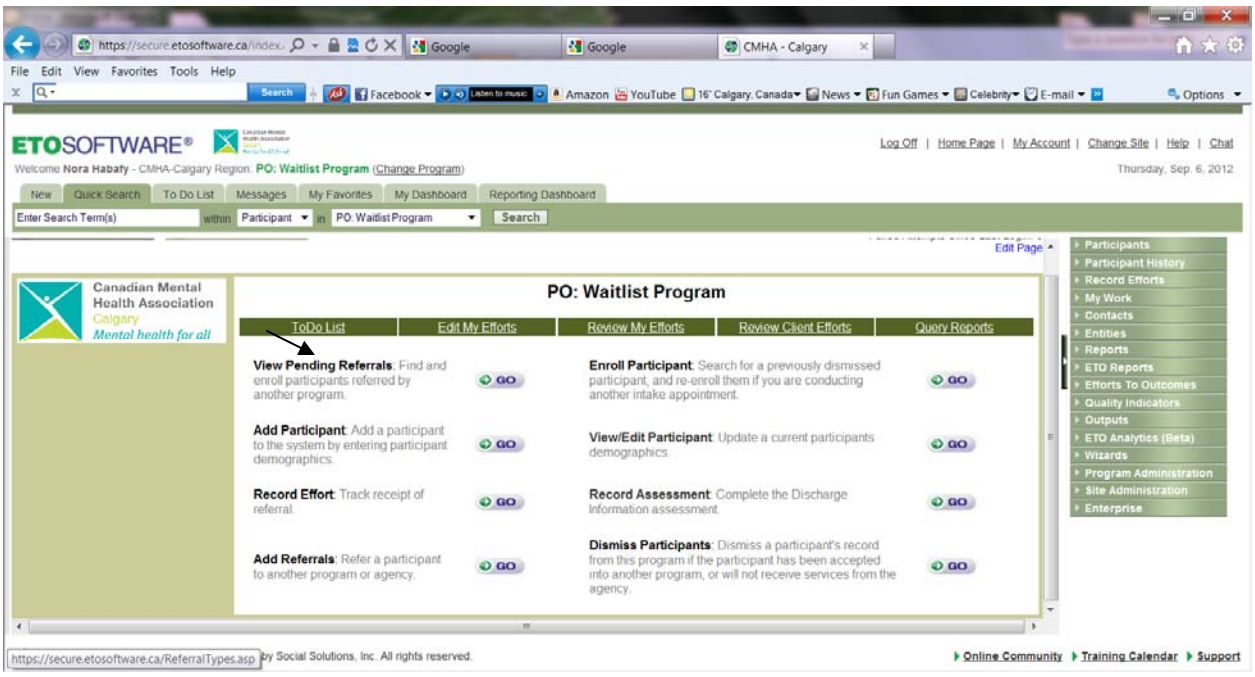
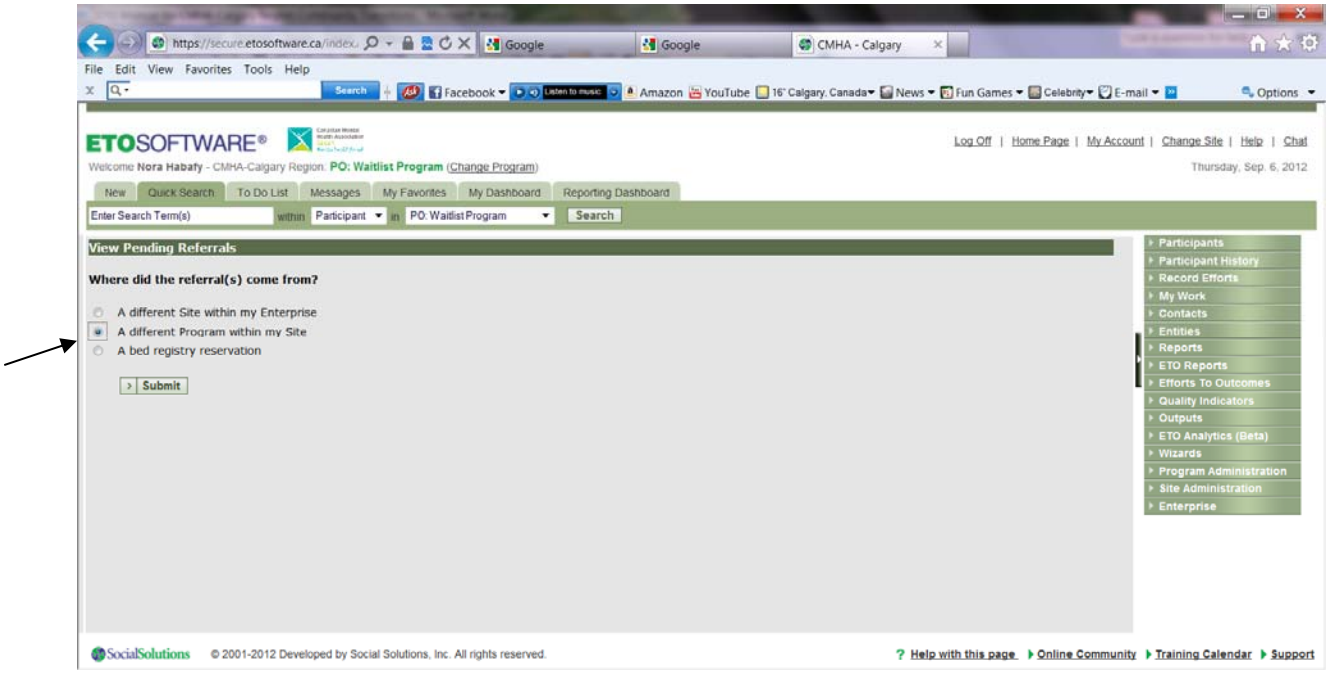
VIEW PENDING REFERRALS FEATURE – PEER OPTIONS PROGRAM ONLY

This feature is in the case a CMHA Staff has made a referral for a client to the Peer Options Wait list program.

On the Peer Options Waitlist Program Home Page, click on 'View Pending Referrals'


ETOSOFTWARE®
Welcome Nora Habafy - CMHA-Calgary Region: PO: Waitlist Program (Change Program)
Canadian Mental Health Association Calgary
Mental health for all
PO: Waitlist Program
ToDo List | Edit My Efforts | Review My Efforts | Review Client Efforts | Query Reports
View Pending Referrals: Find and enroll participants referred by another program. GO
Enroll Participant: Search for a previously dismissed participant, and re-enroll them if you are conducting another intake appointment. GO
Add Participant: Add a participant to the system by entering participant demographics. GO
View/Edit Participant: Update a current participants demographics. GO
Record Effort: Track receipt of referral. GO
Record Assessment: Complete the Discharge Information assessment. GO
Add Referrals: Refer a participant to another program or agency. GO
Dismiss Participants: Dismiss a participant's record from this program if the participant has been accepted into another program, or will not receive services from the agency. GO
https://secure.etosoftware.ca/ReferralTypes.asp
Online Community | Training Calendar | Support

This page will appear. Always click on 'A different program within my site' and then 'Submit'.


ETOSOFTWARE®
Welcome Nora Habafy - CMHA-Calgary Region: PO: Waitlist Program (Change Program)
Thursday, Sep. 6, 2012
View Pending Referrals
Where did the referral(s) come from?
A different Site within my Enterprise
A different Program within my Site
A bed registry reservation
Submit
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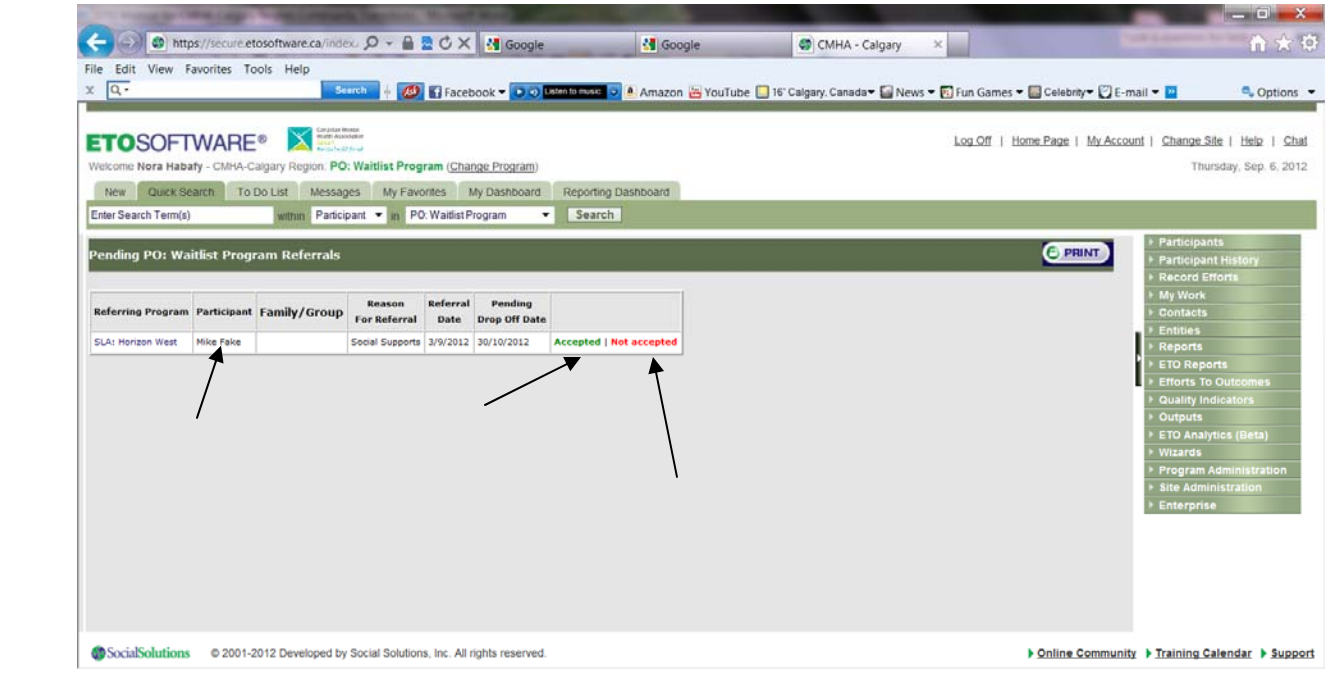
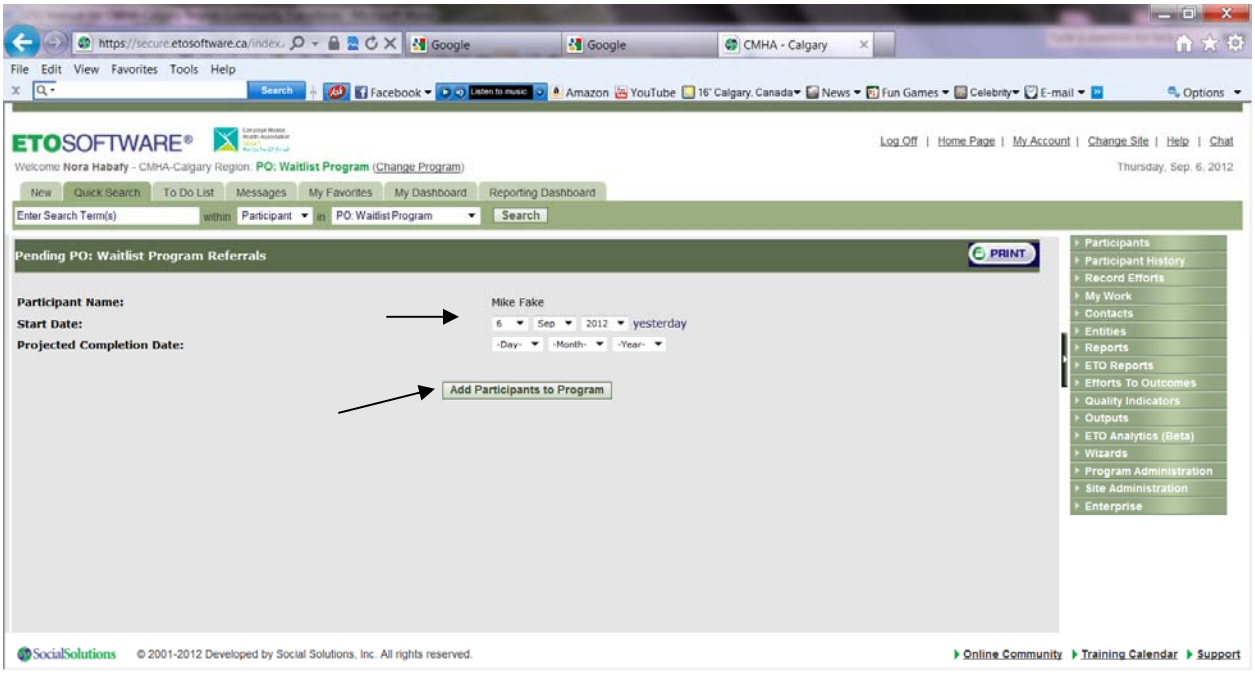
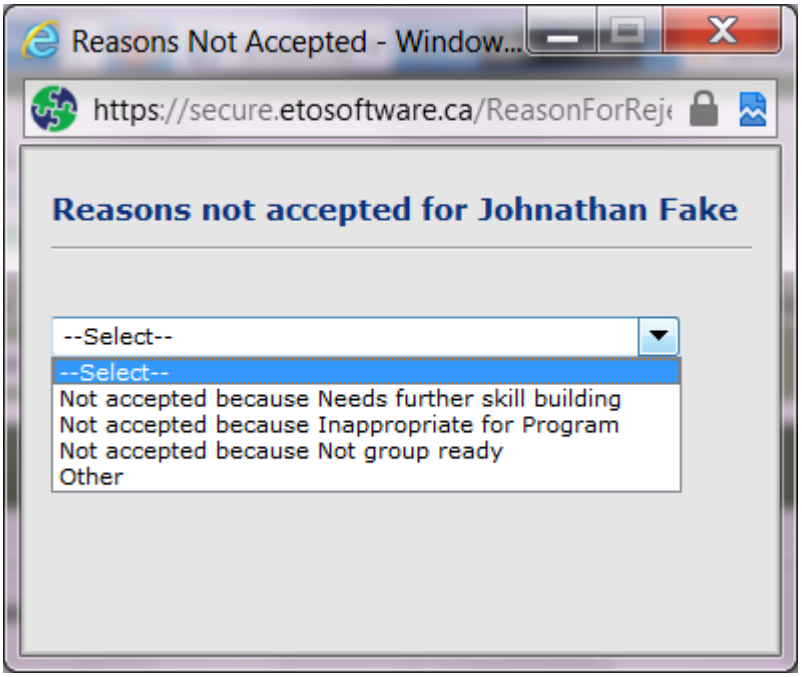
A list of clients referred from CMHA Programs to the Peer Options Wait list Program will appear:



If you click on 'Accepted', this page will appear and you will be able to input the date the client started in the Peer Options Wait List Program, and then click 'Add to the Program'. This will automatically enroll the CMHA client from another Program to the Peer Options Waitlist Program.



If you click on 'Not Accepted', this box will appear and you need to select the appropriate reason for non-acceptance and then click on submit.



After you have accepted or not accepted a client in the Peer Options Program, you will need to dismiss this client from the Peer Options Waitlist:

- For not accepted clients: As soon as the client has not been accepted.
- For accepted clients: Once the client is no longer on the waitlist and the Art of Friendship group will start (Clients can stay in the Peer Options waitlist program until the group starts).

Refer to the section in this manual with regards to dismissing (discharging) a client.

In the case of accepted clients, you will also need to enroll them in the actual Peer Options program – Refer to the section below in this manual.

ENROLLING CLIENT IN YOUR PROGRAM

The **Enroll** feature is typically used in one of three scenarios:

1. A previously dismissed participant is returning to the program for services – Relevant to Leisure Recreation, Continuing Connections, and Peer Options Waitlist (in case the individual was never a CMHA client in another Program but was in Peer Options before).
2. A participant is (or has) been enrolled in another program, and now needs to be enrolled in the selected program, too. – Relevant to Leisure Recreation Program
3. A participant is in the Peer Options Wait List, and now needs to be enrolled in the actual Peer Options Program.

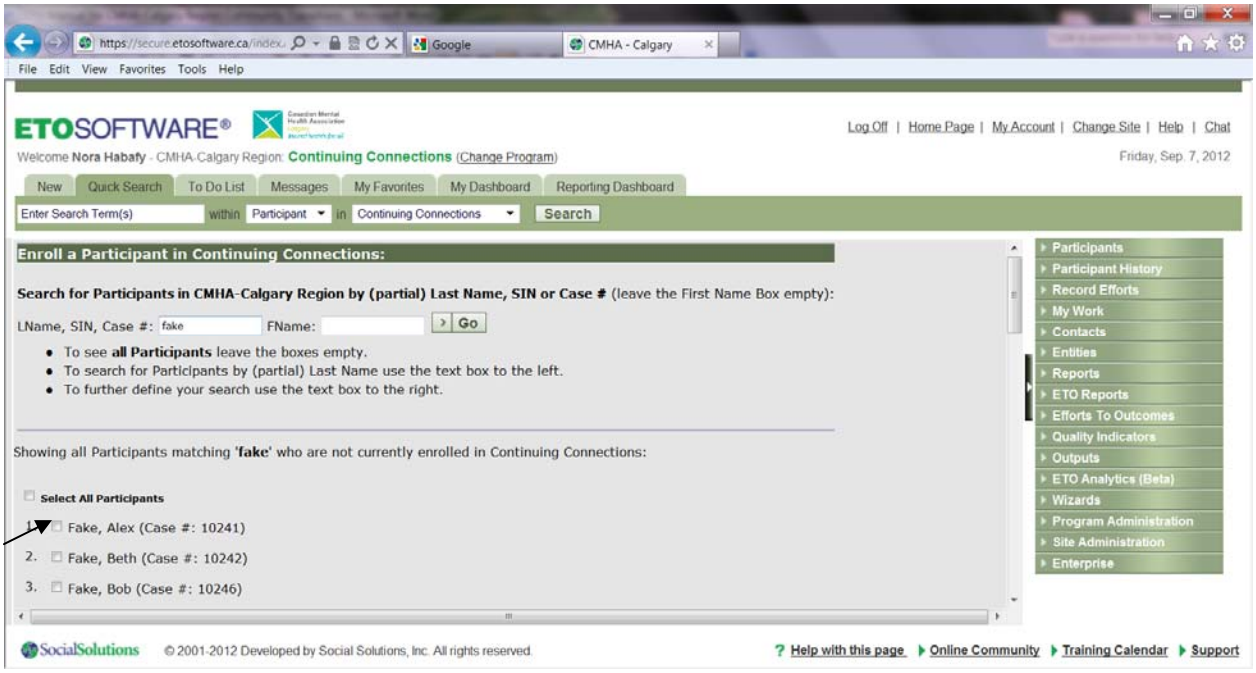
Enroll – To bring a participant that exists in ETO into the selected program and enter a program start date.

Enroll in the context of ETO: Fred got services here three years ago and moved to Florida. When he returned, rather than adding him as a new Participant in ETO, I enrolled him.

Feature to use: Enroll Participant

On your Navigation bar: Go to 'Participants' and then click on 'Enroll Participants' or,
Click on 'Go' next to 'Enroll Participant' on your Program's Home Page.

The search function allows you to search for Participants by Last Name, First Name, SSN, Case Number or Family Name. To see a list of all Participants available for enrollment in the selected program, leave the search boxes empty and click Go. Participant Results are grouped into sets of 50. Select the desired participants (click Next 50 to advance to the next 50 results).


ETOSOFTWARE®
Log Off | Home Page | My Account | Change Site | Help | Chat
Welcome Nora Habafy - CMHA-Calgary Region: Continuing Connections (Change Program)
Friday, Sep 7, 2012
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Enter Search Term(s) within Participant in Continuing Connections Search
Enroll a Participant in Continuing Connections:
Search for Participants in CMHA-Calgary Region by (partial) Last Name, SIN or Case # (leave the First Name Box empty):
LName, SIN, Case #: fake FName: Go
To see all Participants leave the boxes empty.
To search for Participants by (partial) Last Name use the text box to the left.
To further define your search use the text box to the right.
Showing all Participants matching 'fake' who are not currently enrolled in Continuing Connections:
Select All Participants
1. Fake, Alex (Case #: 10241)
2. Fake, Beth (Case #: 10242)
3. Fake, Bob (Case #: 10246)
Participants
Participant History
Record Efforts
My Work
Contacts
Entities
Reports
ETO Reports
Efforts To Outcomes
Quality Indicators
Outputs
ETO Analytics (Beta)
Wizards
Program Administration
Site Administration
Enterprise
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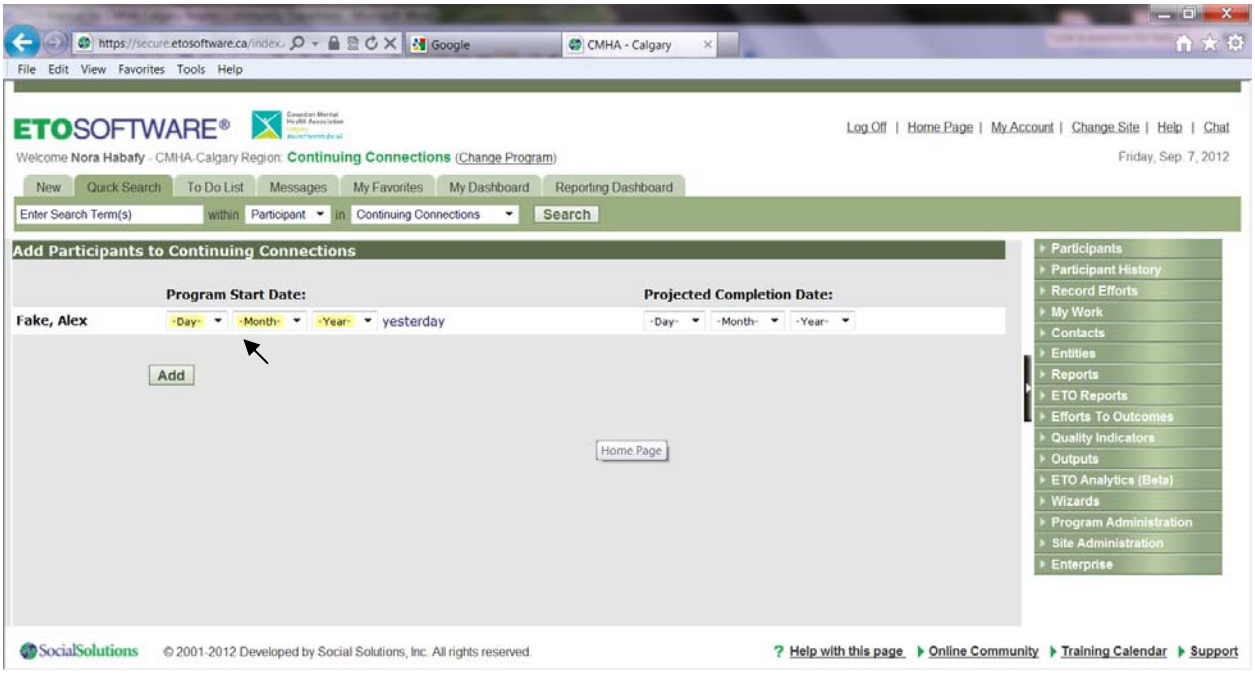
Help with this page | Online Community | Training Calendar | Support

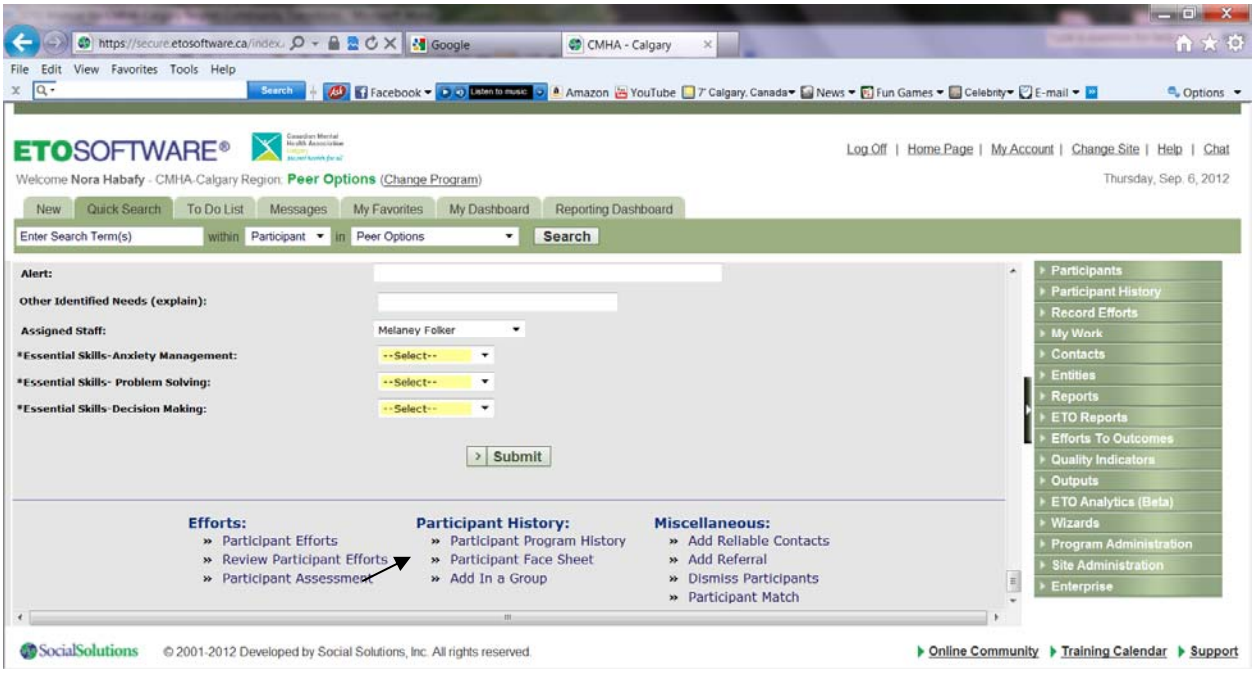
The page above will appear. Put a checkmark in front of the participant's name you are interested in.

Input the Program Start Date when this page appears:



PRINTING A FACESHEET OF YOUR CLIENT

Click on 'Go' next to 'View/Edit Participant' on your Program's Home Page
Search for the client you are interested in.
At the bottom of the demographic page click on 'Participant Face Sheet' and print the Face Sheet.



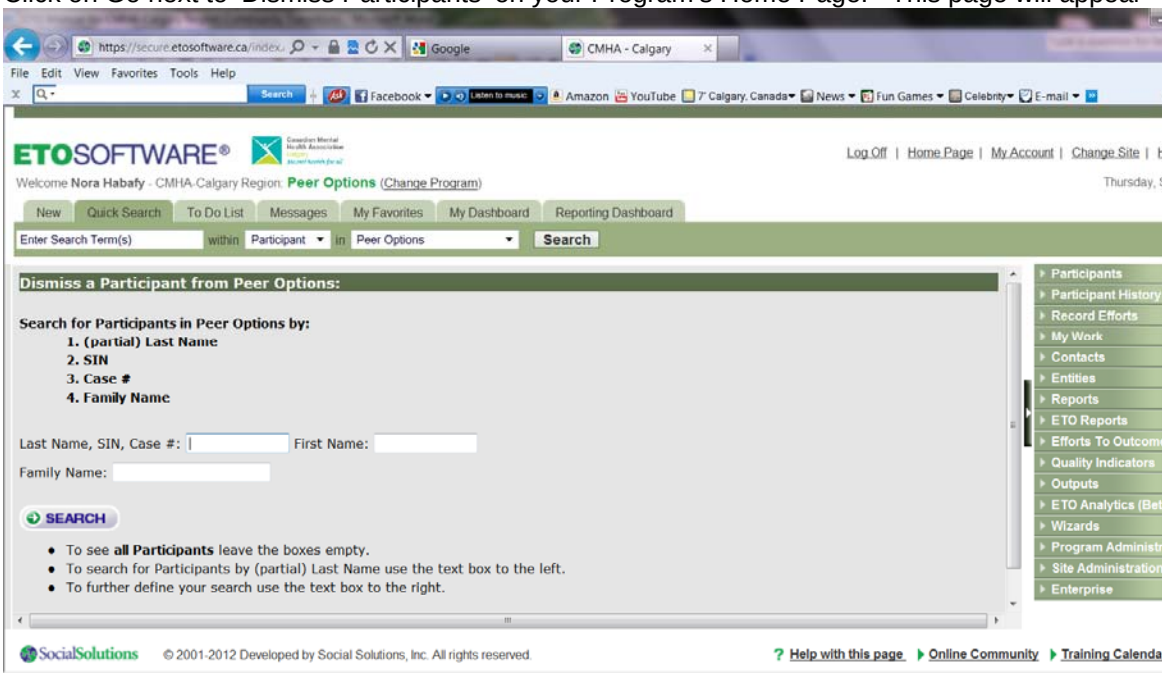
DISMISSING A CLIENT FROM YOUR PROGRAM

Dismiss = Discharge, file closing.

Feature to use: Dismiss Participant

When a Participant is no longer being served by a selected program, it may Dismissed from that program using this feature. Dismissed participant records are not deleted; a dismissed Participant may be re-enrolled with the Enroll Participant feature at any time. Enrollment and dismissal details are stored on the Program History accessed via the button in the upper left of the View Edit or Find Participant pages.

- Click on Go next to 'Dismiss Participants' on your Program's Home Page. This page will appear


ETOSOFTWARE®
Log Off | Home Page | My Account | Change Site |
Welcome Nora Habafy - CMHA-Calgary Region: Peer Options (Change Program)
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Enter Search Term(s) within Participant in Peer Options Search
Dismiss a Participant from Peer Options:
Search for Participants in Peer Options by:
1. (partial) Last Name
2. SIN
3. Case #
4. Family Name
Last Name, SIN, Case #: First Name:
Family Name:
SEARCH
To see all Participants leave the boxes empty.
To search for Participants by (partial) Last Name use the text box to the left.
To further define your search use the text box to the right.
Participants
Participant History
Record Efforts
My Work
Contacts
Entities
Reports
ETO Reports
Quality Indicators
Outputs
Wizards
Enterprise
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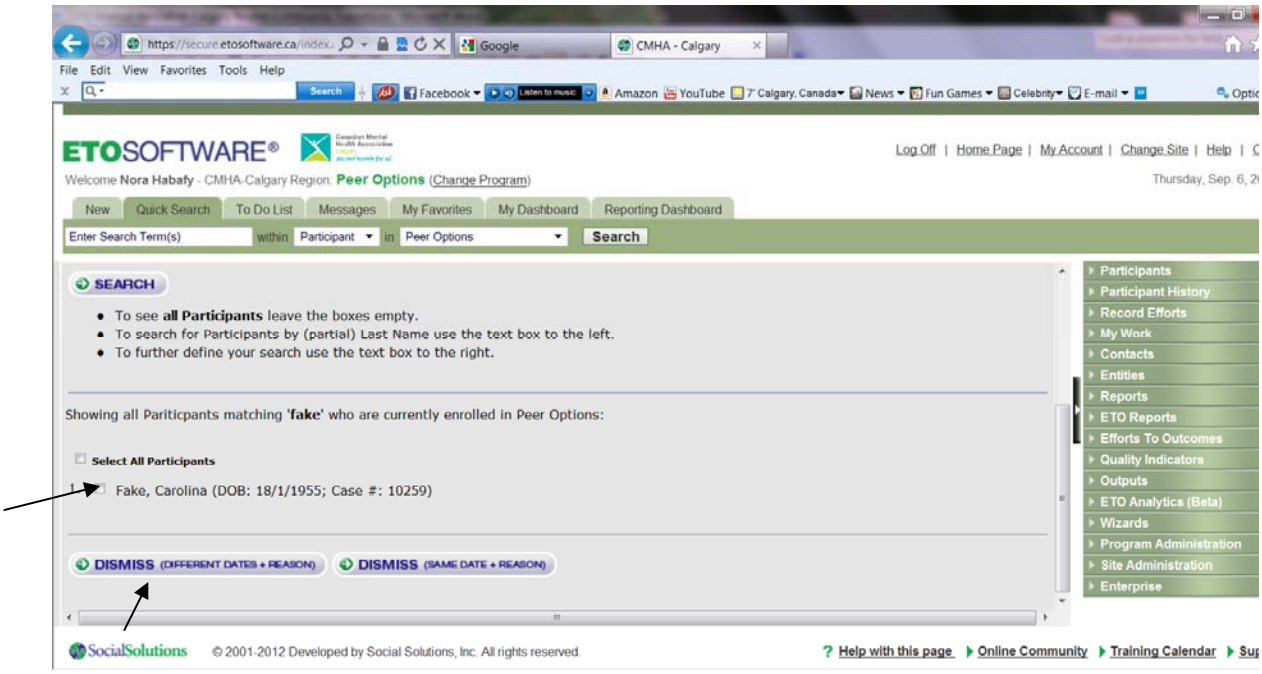
- Search by the (single or combined) full or partial last name and/or full or partial first name. This page will appear:


ETOSOFTWARE
Welcome Nora Habafy - CMHA-Calgary Region: Peer Options (Change Program)
Log Off | Home Page | My Account | Change Site | Help
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Enter Search Term(s) within Participant in Peer Options Search
SEARCH
To see all Participants leave the boxes empty.
To search for Participants by (partial) Last Name use the text box to the left.
To further define your search use the text box to the right.
Showing all Pariticpants matching 'fake' who are currently enrolled in Peer Options:
Select All Participants
Fake, Carolina (DOB: 18/1/1955; Case #: 10259)
DISMISS (DIFFERENT DATES + REASON)
DISMISS (SAME DATE + REASON)
Participants
Participant History
Record Efforts
My Work
Contacts
Entities
Reports
ETO Reports
Efforts To Outcomes
Quality Indicators
Outputs
ETO Analytics (Beta)
Wizards
Program Administration
Site Administration
Enterprise
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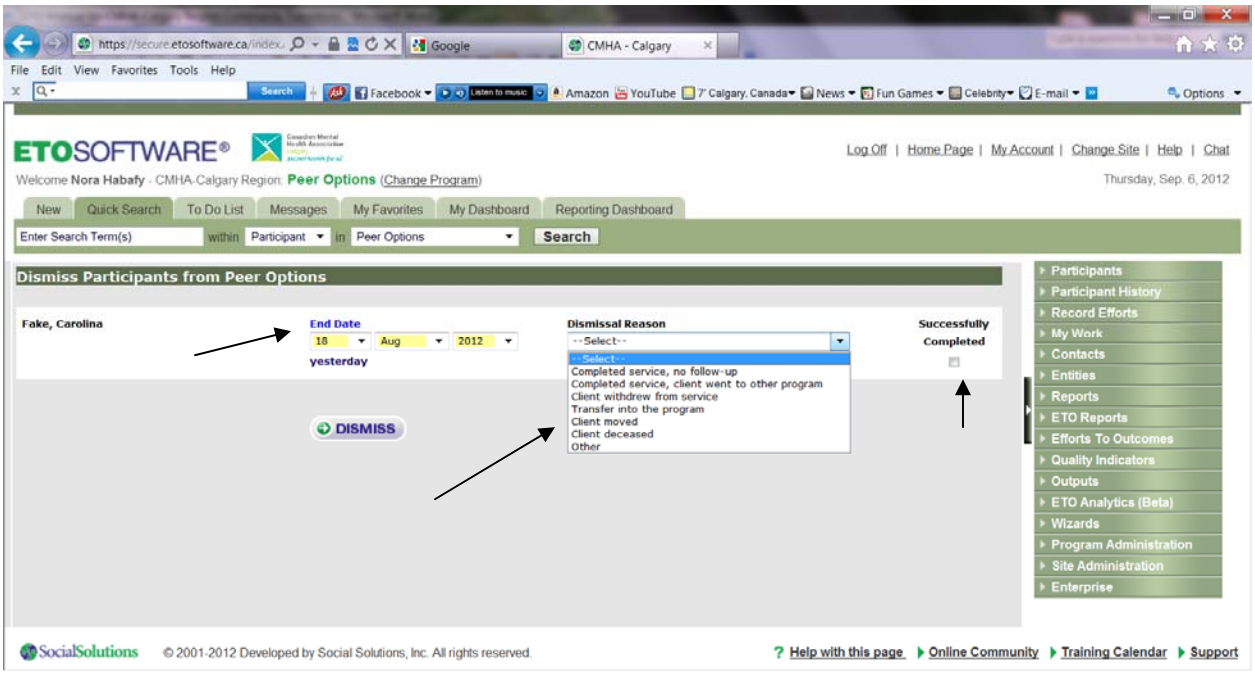
- Put a checkmark next to the client's name and click on Dismiss (Different Dates + Reasons). This page will appear:



Input the End Date, select the dismissal reason, and put a checkmark in 'Successfully completed' if the client successfully completed your Program.

These are the dismissal reasons:

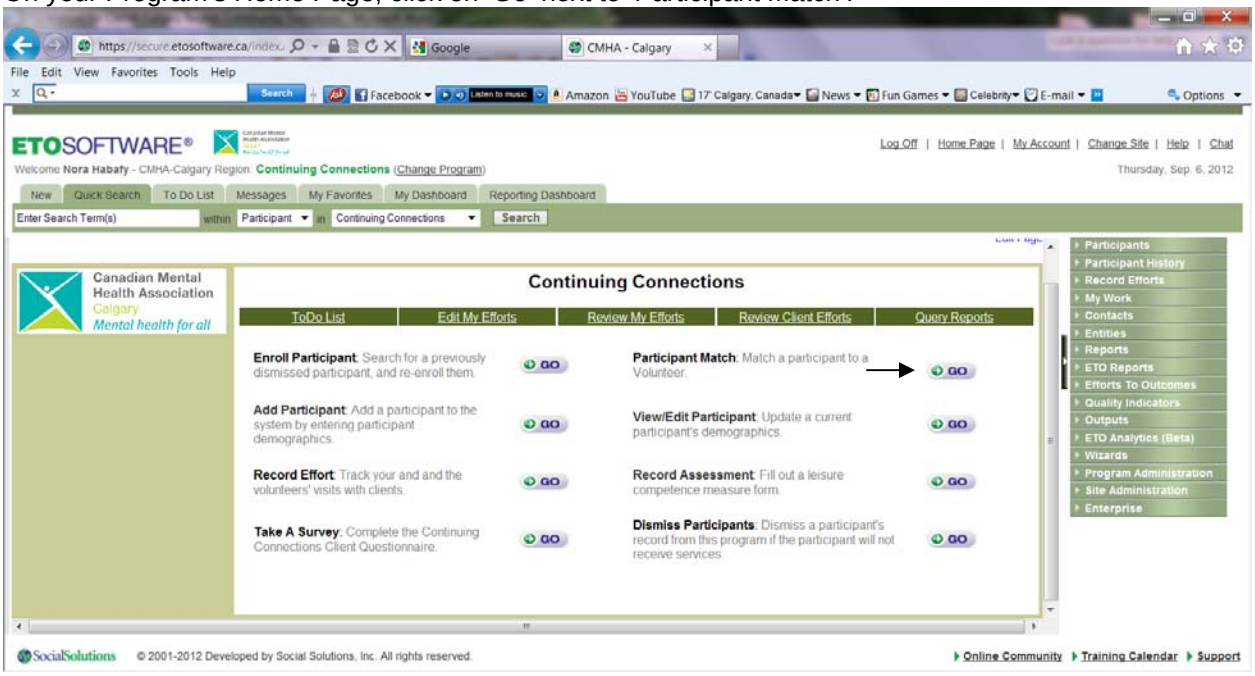
- Completed Service, no follow-up: To be used when the client has successfully completed the Program.
- Completed Service, client went to other Program: To be used when the client has successfully completed your Program and is transferring to another CMHA Program or to another Program in the community
- Client withdrew from Service
- Transfer into the Program: *****This is only to be used by the Peer Options Waitlist Program when an individual is dismissed from the Peer Options Waitlist Program, is accepted, and is moving into the Actual Program*****
- Client Moved: When client left the program because is moving to another city.
- Client Deceased
- Other

After dismissing a client, you will need to complete:

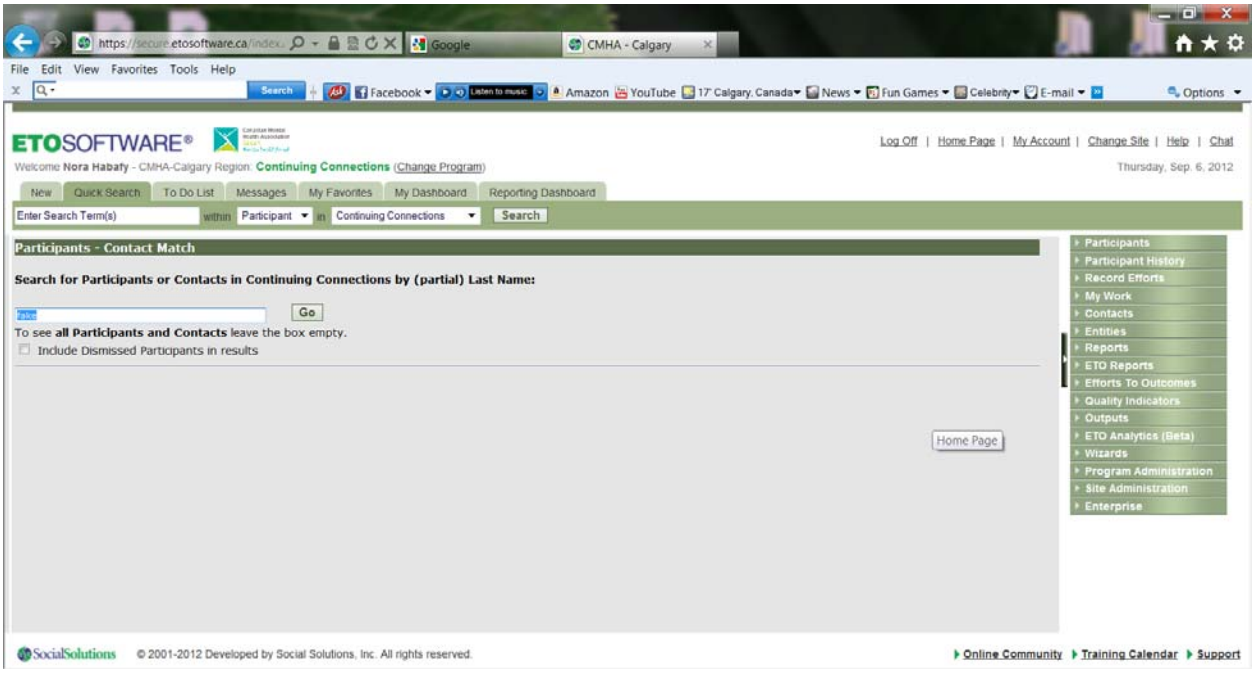
The Discharge Information Assessment (without housing item). This is a Participant Assessment – Refer to the appropriate section in this Manual.

MATCHING A VOLUNTEER TO A CLIENT – CONTINUING CONNECTIONS PROGRAM ONLY

On your Program's Home Page, click on 'Go' next to 'Participant Match'.



When this page appears, do a search for the client you are interested in and click on his/her name.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Log Off | Home Page | My Account | Change Site | Help | Chat
Thursday, Sep. 6, 2012
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Enter Search Term(s) within Participant in Continuing Connections Search
Participants - Contact Match
Search for Participants or Contacts in Continuing Connections by (partial) Last Name:
Go
To see all Participants and Contacts leave the box empty.
Include Dismissed Participants in results
Home Page
Participants
Participant History
Record Efforts
My Work
Contacts
Entities
Reports
ETO Reports
Efforts To Outcomes
Quality Indicators
Outputs
ETO Analytics (Beta)
Wizards
Program Administration
Site Administration
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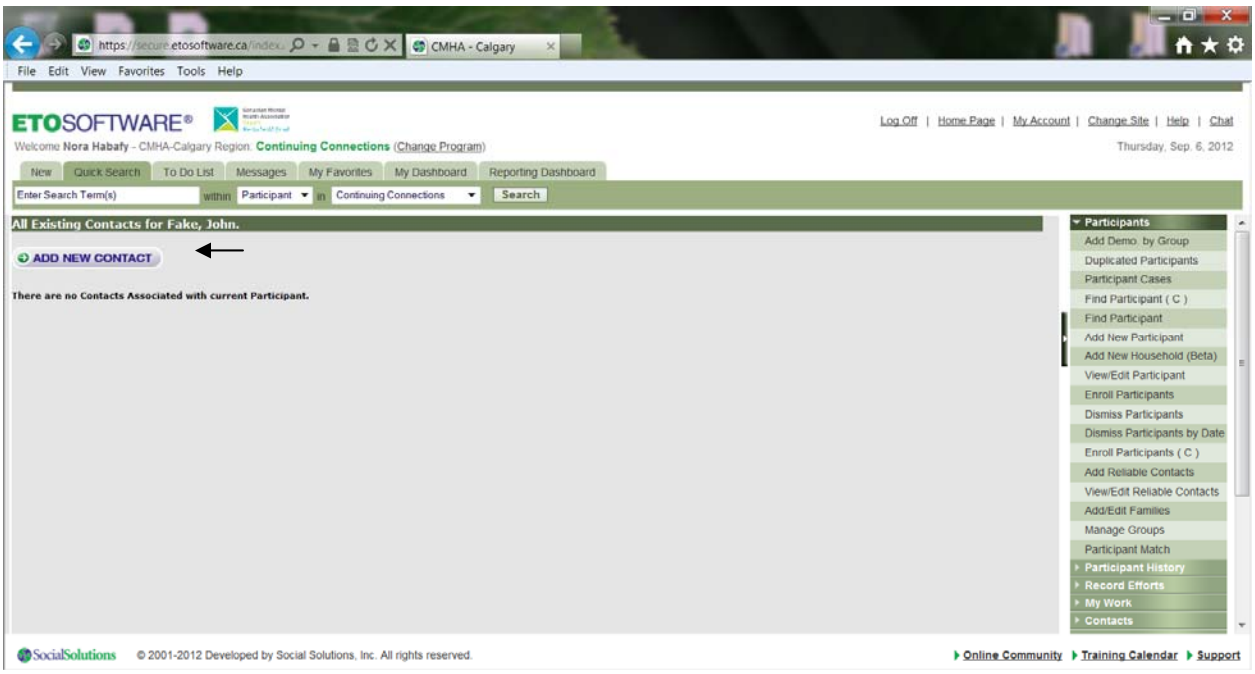
This page will appear: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Welcome Nora Habafy - CMHA-Calgary Region: Continuing Connections (Change Program)
Log Off | Home Page | My Account | Change Site | Help | Chat
Thursday, Sep. 6, 2012
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Enter Search Term(s) within Participant in Continuing Connections Search
All Existing Contacts for Fake, John.
ADD NEW CONTACT
There are no Contacts Associated with current Participant.
Participants
Add Demo. by Group
Duplicated Participants
Participant Cases
Find Participant (C)
Find Participant
Add New Participant
Add New Household (Beta)
View/Edit Participant
Enroll Participants
Dismiss Participants
Dismiss Participants by Date
Enroll Participants (C)
Add Reliable Contacts
View/Edit Reliable Contacts
Add/Edit Families
Manage Groups
Participant Match
Participant History
Record Efforts
My Work
Contacts
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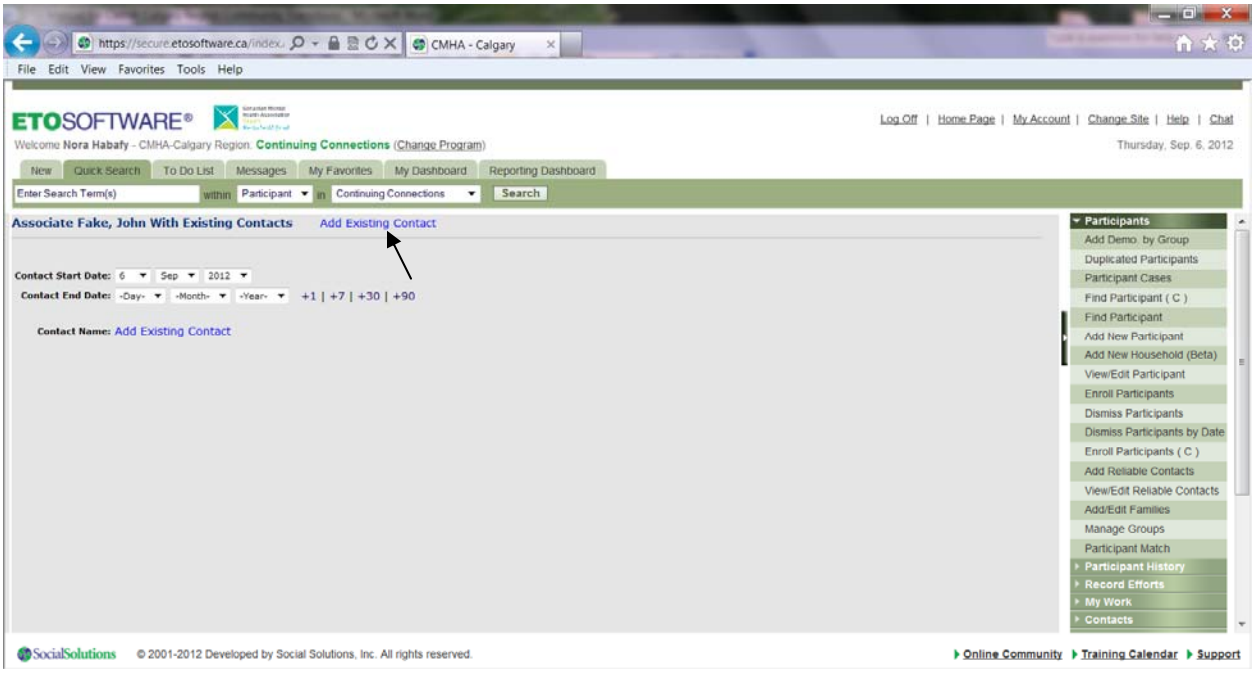
Click on ‘Add New Contact’. This page will appear. Click on ‘Add existing contact’.


CMHA - Calgary
File Edit View Favorites Tools Help
ETOSOFTWARE®
Log Off | Home Page | My Account | Change Site | Help | Chat
Welcome Nora Habafy - CMHA-Calgary Region. Continuing Connections (Change Program)
Thursday, Sep. 6, 2012
New Quick Search To Do List Messages My Favorites My Dashboard Reporting Dashboard
Enter Search Term(s) within Participant in Continuing Connections Search
Associate Fake, John With Existing Contacts Add Existing Contact
Contact Start Date: 6 Sep 2012
Contact End Date: -Day- -Month- -Year- +1 | +7 | +30 | +90
Contact Name: Add Existing Contact
Participants
Add Demo. by Group
Duplicated Participants
Participant Cases
Find Participant (C)
Find Participant
Add New Participant
Add New Household (Beta)
View/Edit Participant
Enroll Participants
Dismiss Participants
Dismiss Participants by Date
Enroll Participants (C)
Add Reliable Contacts
View/Edit Reliable Contacts
Add/Edit Families
Manage Groups
Participant Match
Participant History
Record Efforts
My Work
Contacts
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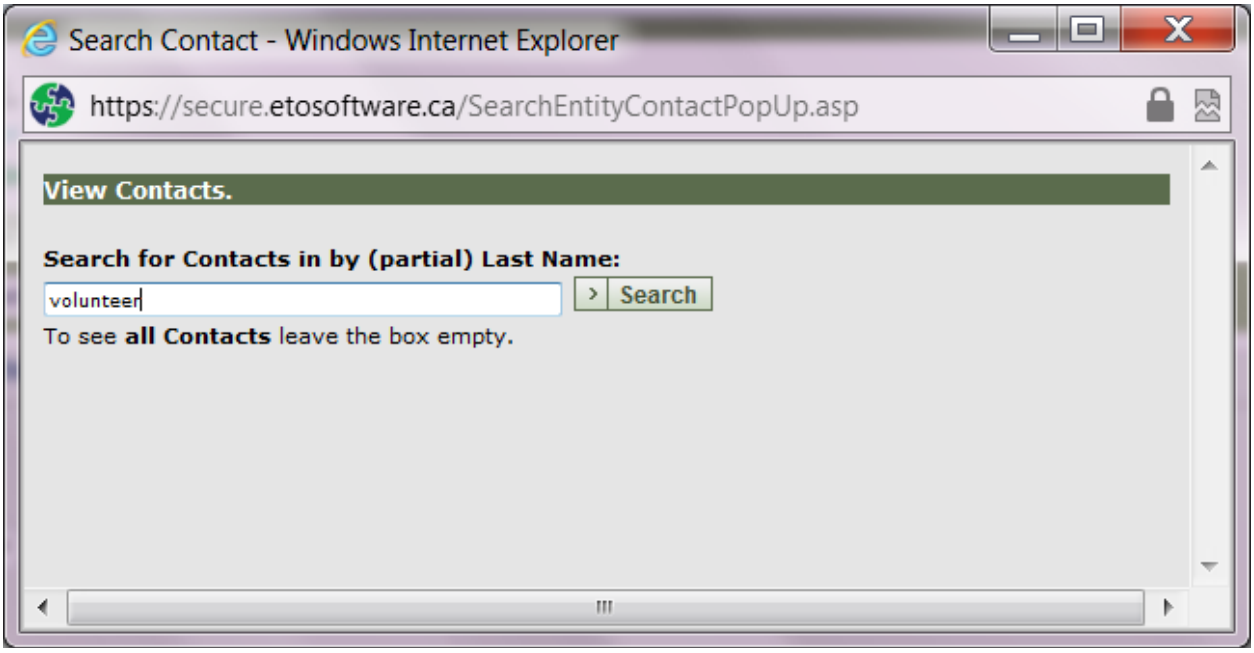
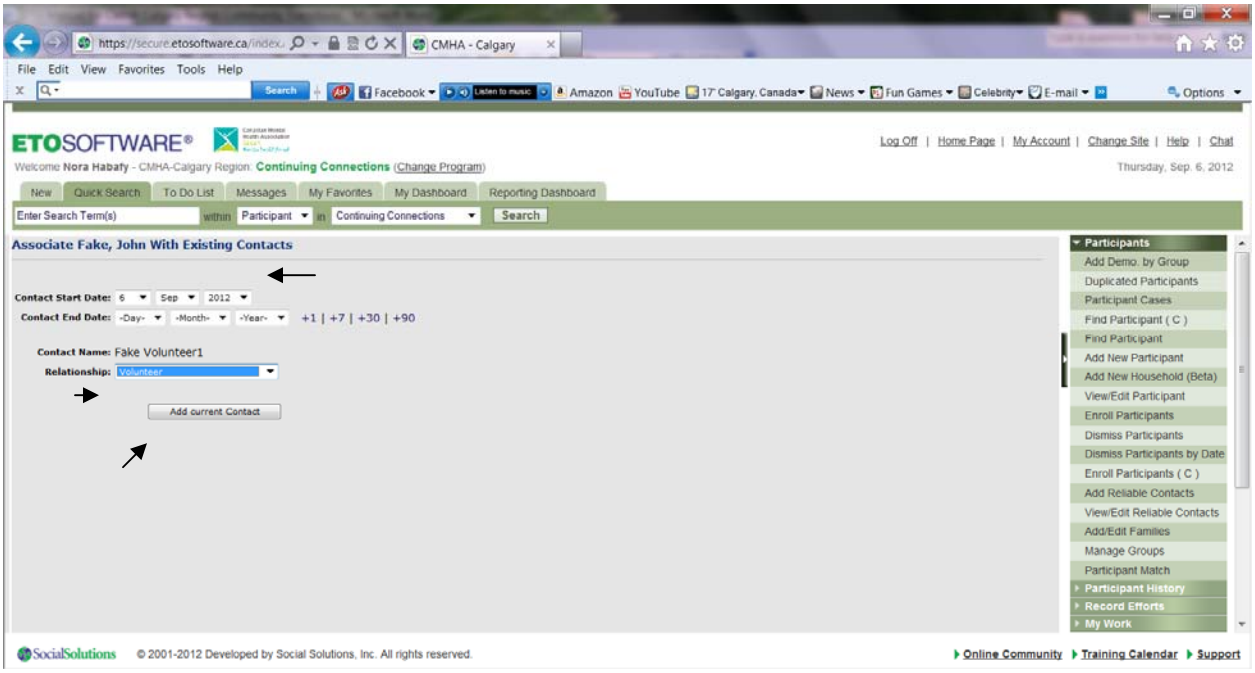
This box will appear. Type in the name of the volunteer and then click on ‘search‘



When the name of the volunteer appears, click on ‘Work with contact’.
When this page appears, input the contact start date and the relationship ‘Volunteer’, and then click on ‘Add current contact’.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Log Off | Home Page | My Account | Change Site | Help | Chat
Welcome Nora Habafy - CMHA-Calgary Region: Continuing Connections (Change Program)
Thursday, Sep. 6, 2012
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Enter Search Term(s) within Participant in Continuing Connections Search
Associate Fake, John With Existing Contacts
Contact Start Date: 6 Sep 2012
Contact End Date: -Day- -Month- -Year- +1 | +7 | +30 | +90
Contact Name: Fake Volunteer1
Relationship: Volunteer
Add current Contact
Participants
Add Demo. by Group
Duplicated Participants
Participant Cases
Find Participant (C)
Find Participant
Add New Participant
Add New Household (Beta)
View/Edit Participant
Enroll Participants
Dismiss Participants
Dismiss Participants by Date
Enroll Participants (C)
Add Reliable Contacts
View/Edit Reliable Contacts
Add/Edit Families
Manage Groups
Participant Match
Participant History
Record Efforts
My Work
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RECORDING YOUR INDIVIDUAL TIME WITH A CLIENT

Point of Service – This is where time and energy spent is tracked within ETO. We tried to set up Points of Service so that time spent can be related to client progress (such as going from lack of engagement to full engagement). Points of Service are entered by Recording Efforts.

Point of Service in the context of ETO: "We used to enter case notes in Word documents and attendance information in Excel. Now staff enter that information into Point of Service using the Record Efforts features and the reporting options are great!"

Effort – Entry of Point of Service data, which is also known as recording efforts. There are several record efforts features in ETO: Efforts can be recorded for Participants, Entities, or General. Efforts can be recorded for one Participant (Entity) at a time, or Multiple Participants (Participants).

Most Point of Service elements are built with a field to capture time spent on contact. Time spent on contact and number of contacts both track effort on behalf of staff entering their work. ETO has the capacity for many efforts to be recorded for a given participant on the same day; effort data is typically entered with more frequency than any other type.

Value – The data field that appears on Record Efforts pages where users provide a response to the Point of Service name. Values may be presented as a drop box of choices (which can be edited by the ETO Administrator), a Yes/No selection, or a blank box, which indicates that Numeric data be entered.

Value in the context of ETO: "When I went to record an effort in ETO I was on the fence as to whether to select the value of Contemplation or Planning, but after speaking with my program manager about how the values are defined, it was clear the Participant is in Planning, so that's the value I chose!"

These are the Points of Service for your Programs:

Continuing Connections:

- Track Activities with client: Visits with clients, phone calls with clients

This is a Composite Point of Service. A Composite Point of Service allows you to enter data on more than one related Point of Service on the same screen.

- Track social visits by volunteers

Peer Options:

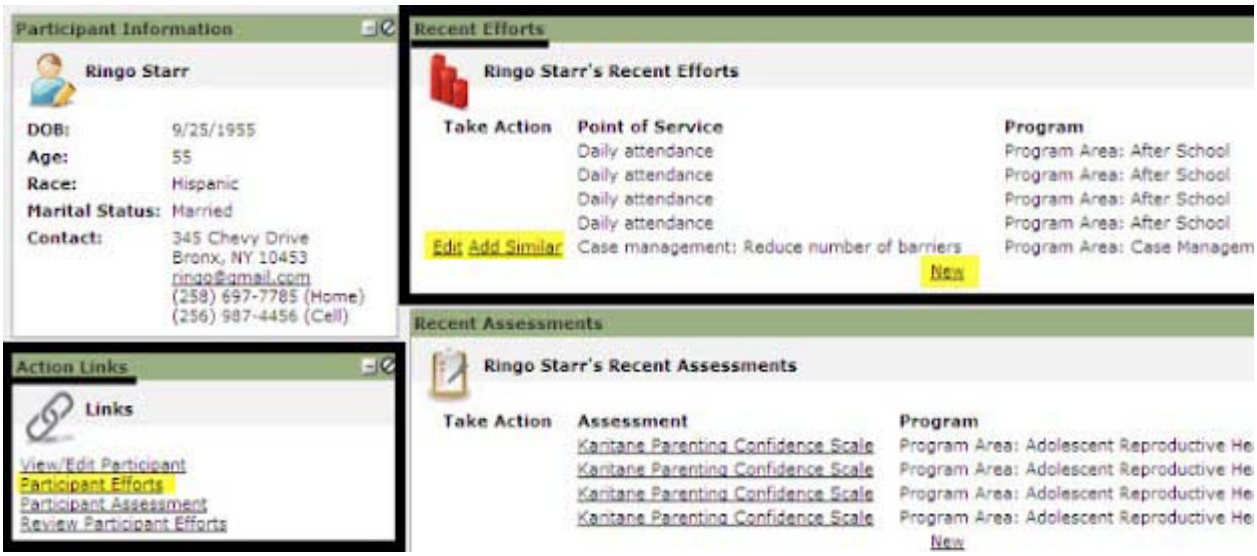
- Program Transition

Feature to use: Record Efforts

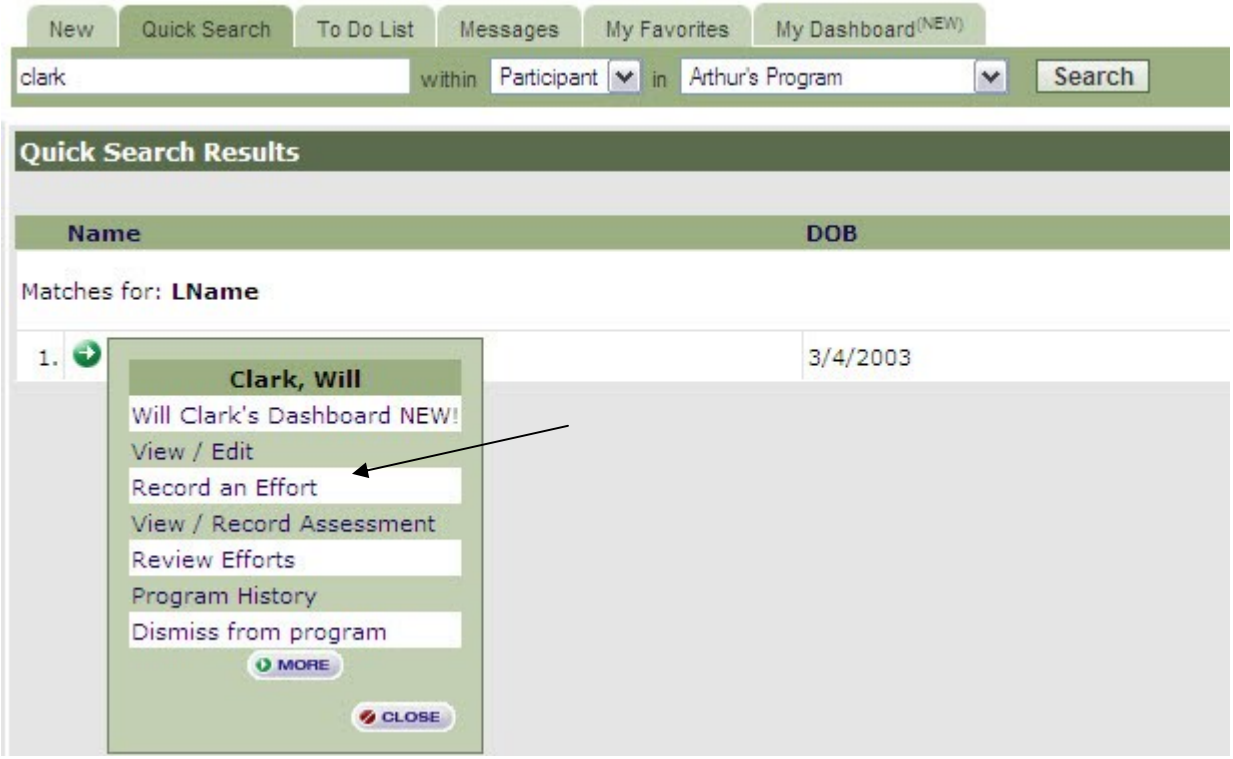
Efforts are used to enter Point of Service data. Points of Service allow for time spent with Participants to be captured. Efforts are entered with more frequency than any other feature in ETO.

There are several ways to access the Participant Efforts feature:

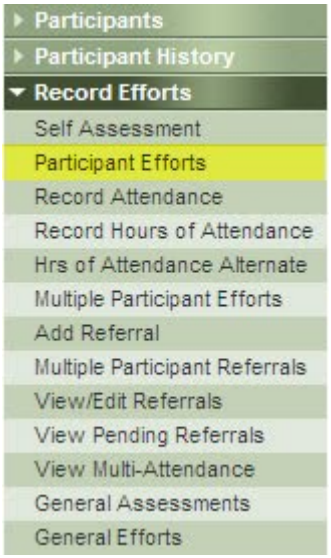
1. Go to the Participant's Dashboard (through the Quick Search link, the link at the top of the View/Edit Participant page, or from My Dashboard). Once on the Participant's Dashboard, click the Participant Efforts link inside the Action Links ETO Part, or utilize the appropriate link (Edit, Add Similar, New) within the Recent Efforts ETO Part.



2. Perform a Quick Search within the selected program, click on the Participant, then click Record an Effort:

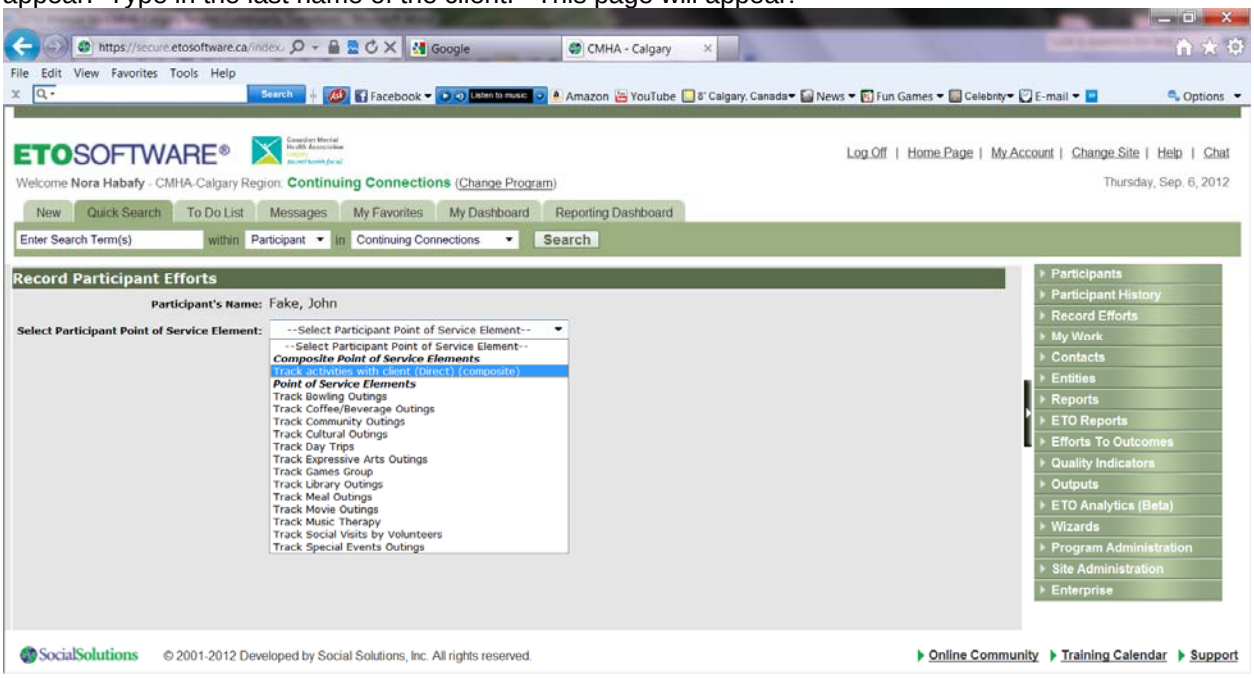


3. Go to the Navigation Bar feature, find ‘Record Efforts’ and click on ‘Participant Efforts’. Search for the Participant and click on his/her name.



Participant Efforts
Search for Participants in All Tools by (partial) Last Name, SSN or Case Number:
Show All Participants
SEARCH
Include Dismissed Participants in results
To see all Participants leave the box empty.
S.No
Name
DOB
1. GO Brown, Charlie 2/12/1987
2. GO Butz, Steve 1/1/1981
3. GO Finlay, Sean unknown

4. Click on 'Go' next to 'Record Efforts' on your Program' Home Page. The search page will appear. Type in the last name of the client. This page will appear: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Log Off | Home Page | My Account | Change Site | Help | Chat
Welcome Nora Habafy - CMHA-Calgary Region: Continuing Connections (Change Program)
Thursday, Sep. 6, 2012
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Enter Search Term(s) within Participant in Continuing Connections Search
Record Participant Efforts
Participant's Name: Fake, John
Select Participant Point of Service Element:
--Select Participant Point of Service Element--
Composite Point of Service Elements
Track activities with client (Direct) (composite)
Point of Service Elements
Track Bowling Outings
Track Coffee/Beverage Outings
Track Community Outings
Track Cultural Outings
Track Day Trips
Track Expressive Arts Outings
Track Games Group
Track Library Outings
Track Meal Outings
Track Movie Outings
Track Music Therapy
Track Social Visits by Volunteers
Track Special Events Outings
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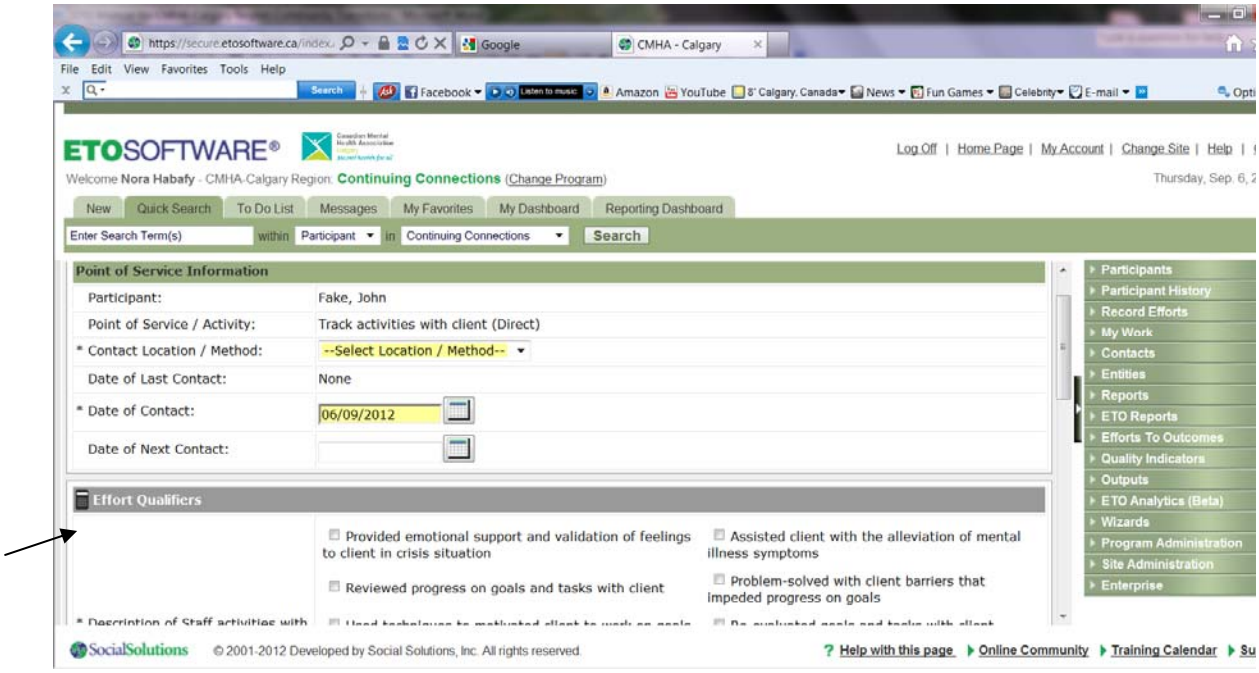
You will be presented with a drop box. Select the appropriate Point of Service Element and click the Submit button. Note that if there is only one Participant Point of Service in the selected program, this screen will flash by very quickly and you will be auto directed to the data entry screen. Also, if you clicked the Add Similar link on the Recent Efforts ETO Part, the drop box will not appear and the user will be auto directed to the data entry screen for that Point of Service.

The Participant Effort screen will appear.
The top of the Participant Effort screen will include:

- Name of selected Participant
- Name of selected Point of Service
- Contact Location/Method drop box - how or where was the service delivered?
- Date of Last Contact - this will be None if no efforts have been recorded with the selected Participant within the selected Point of Service
- Date of Contact - this is the date the service was rendered - note that the date cannot be in the

future

- Date of Next Contact - this date populates the To Do List - note that the day must be in the future. Select a date from the calendar date picker, or enter a plus sign and the number of days until the reminder (+7). If you do not enter a date of next contact, a reminder will pop up. You will have the option to click a link to request this reminder not pop up in the future.
- If there is an 'Effort Qualifier' section such as in the Point of Service 'Track Activities with client', select the appropriate options.


ETOSOFTWARE®
Log Off | Home Page | My Account | Change Site | Help
Welcome Nora Habafy - CMHA-Calgary Region: Continuing Connections (Change Program)
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Enter Search Term(s) within Participant in Continuing Connections Search
Point of Service Information
Participant: Fake, John
Point of Service / Activity: Track activities with client (Direct)
* Contact Location / Method: --Select Location / Method--
Date of Last Contact: None
* Date of Contact: 06/09/2012
Date of Next Contact:
Effort Qualifiers
Provided emotional support and validation of feelings to client in crisis situation
Assisted client with the alleviation of mental illness symptoms
Reviewed progress on goals and tasks with client
Problem-solved with client barriers that impeded progress on goals
Participants
Participant History
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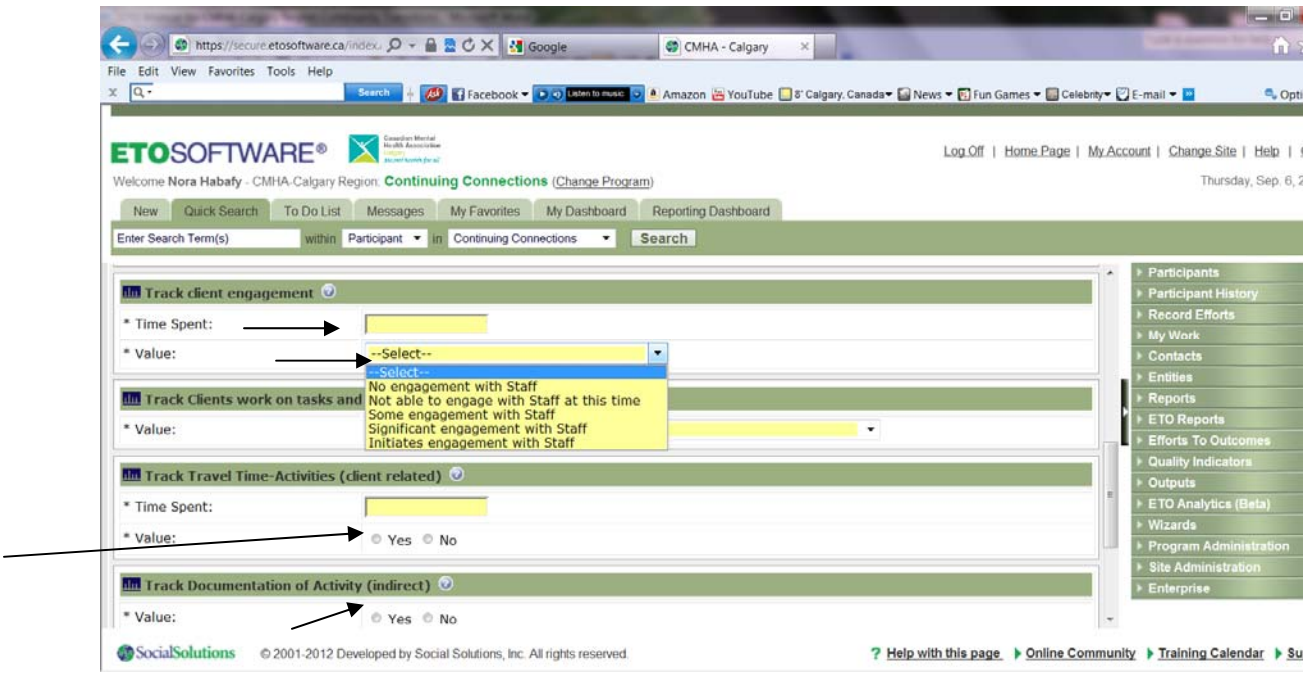
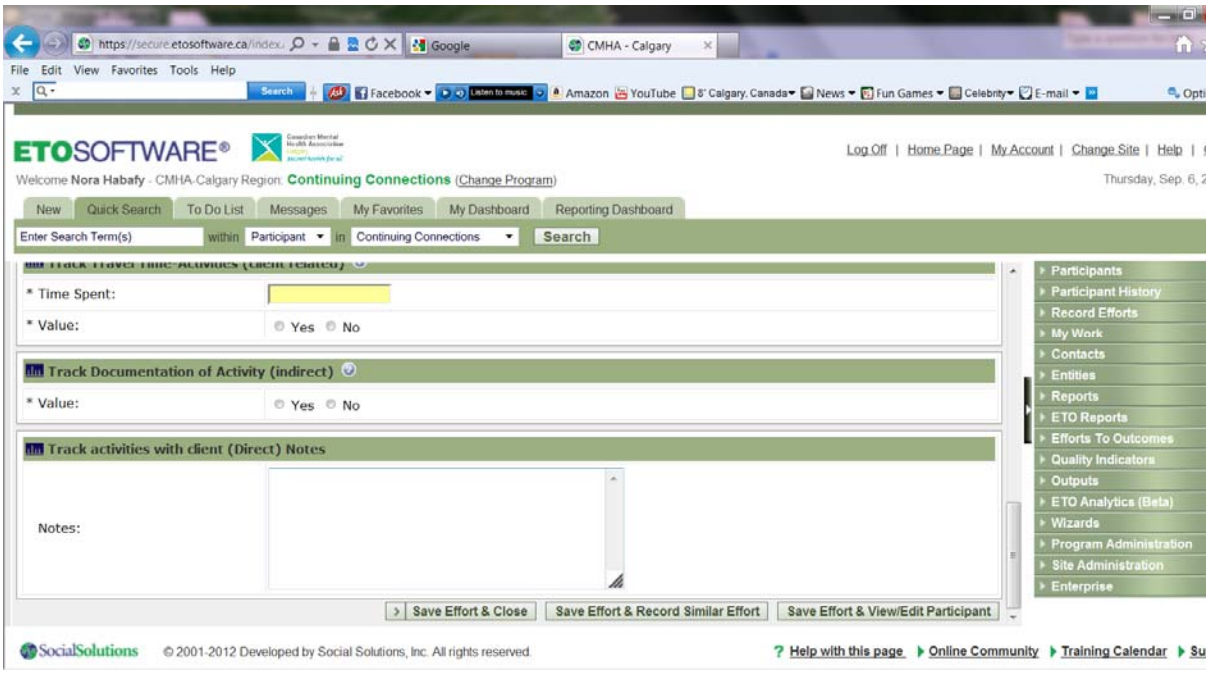
- If there is a section that has 'Value choices', such as below in the Point of Service 'Client engagement' within the composite Point of Service 'Track activities with client', select the appropriate value choice.
- If there is a section that has the Values 'Yes or No', such as below in the Point of Service 'Track travel time' within the composite Point of Service 'Track activities with client', select 'Yes' if there was travel time and select 'No' if there was no travel time. The same for 'Track documentation of activities with client'. If you select 'No' input '0' for time spent.
- **Time Spent: Is always in Minutes and always in 15 minutes increments: e.g. 15, 30, 45, 90, 120, 180, etc.**



- Type in your case note in the Notes box that holds up to 7,250 characters. The box will expand with a scroll bar on the right to accommodate text beyond what's visible. ETO doesn't have an integrated spell checker so some people prefer to write their notes in Word and then paste them. Try to avoid using double quotation marks, because they can affect the appearance of certain standard reports and query results.



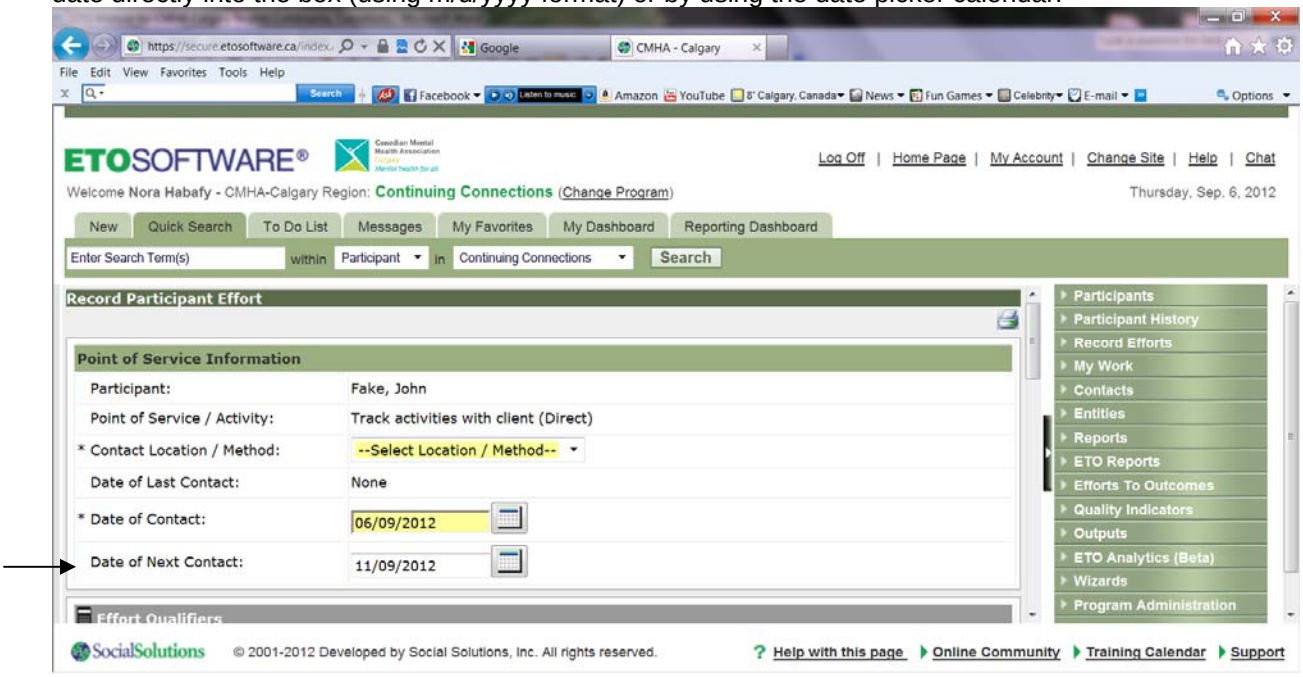
- Three save options:
    - Save Effort & Close
    - Save Effort & Record Similar Effort : This is to record data for the same Point of Service for the same participant.
    - Save Effort & View/Edit Participant: This is if you want to update demographic data of the

participant after you have entered a Point of Service.

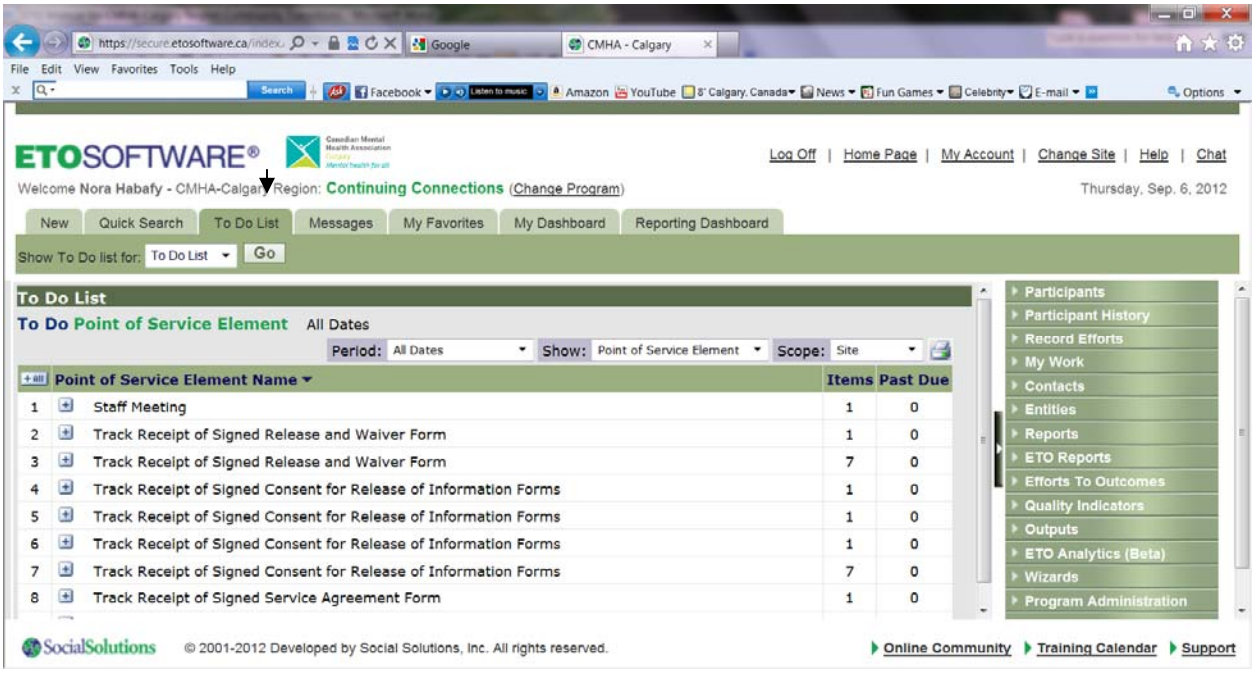
If you have entered a Next Contact Date because you know when the next appointment with your client is, then you can use the To Do List feature. You can use the To Do List feature to directly record the effort that you had on that 'Next Contact Date'.

To Do List

The Date of Next Contact can be entered with a plus sign followed by the number of days (+14), typing a date directly into the box (using m/d/yyyy format) or by using the date picker calendar.



The To Do List is accessed by clicking the To Do List tab at the top of the screen, or on Programs' Home Page.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Log Off | Home Page | My Account | Change Site | Help | Chat
Welcome Nora Habafy - CMHA-Calgary Region: Continuing Connections (Change Program)
Thursday, Sep. 6, 2012
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Show To Do list for: To Do List Go
To Do List
To Do Point of Service Element All Dates
Period: All Dates Show: Point of Service Element Scope: Site
Point of Service Element Name | Items | Past Due
1 Staff Meeting 1 0
2 Track Receipt of Signed Release and Waiver Form 1 0
3 Track Receipt of Signed Release and Waiver Form 7 0
4 Track Receipt of Signed Consent for Release of Information Forms 1 0
5 Track Receipt of Signed Consent for Release of Information Forms 1 0
6 Track Receipt of Signed Consent for Release of Information Forms 1 0
7 Track Receipt of Signed Consent for Release of Information Forms 7 0
8 Track Receipt of Signed Service Agreement Form 1 0
Participants
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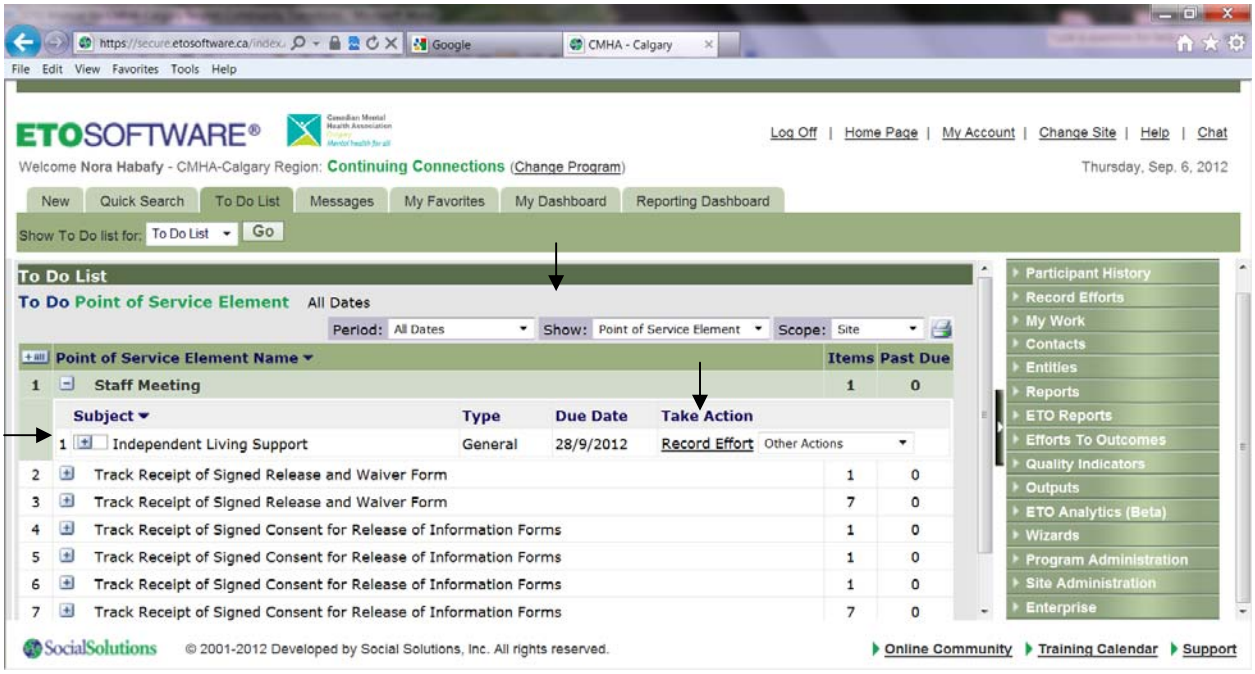
Click the toggle (plus sign) on the left side of the Point of Service Element to expand the details. The Take Action drop box includes: Record Effort, View Efforts History, View/Edit Participant, Change Due Date, and for Program Managers and higher, Assign Effort to Staff.


ETOSOFTWARE®
Log Off | Home Page | My Account | Change Site | Help | Chat
Welcome Nora Habafy - CMHA-Calgary Region: Continuing Connections (Change Program)
Thursday, Sep. 6, 2012
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Show To Do list for: To Do List Go
To Do List
To Do Point of Service Element All Dates
Period: All Dates Show: Point of Service Element Scope: Site
Point of Service Element Name | Items | Past Due
1 Staff Meeting 1 0
Subject | Type | Due Date | Take Action
1 Independent Living Support General 28/9/2012 Record Effort Other Actions
2 Track Receipt of Signed Release and Waiver Form 1 0
3 Track Receipt of Signed Release and Waiver Form 7 0
4 Track Receipt of Signed Consent for Release of Information Forms 1 0
5 Track Receipt of Signed Consent for Release of Information Forms 1 0
6 Track Receipt of Signed Consent for Release of Information Forms 1 0
7 Track Receipt of Signed Consent for Release of Information Forms 7 0
Participant History
Record Efforts
My Work
Contacts
Entities
Reports
ETO Reports
Efforts To Outcomes
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Program Administration
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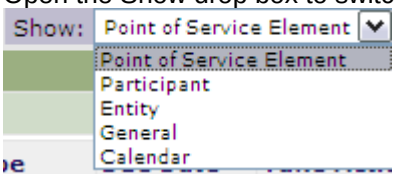
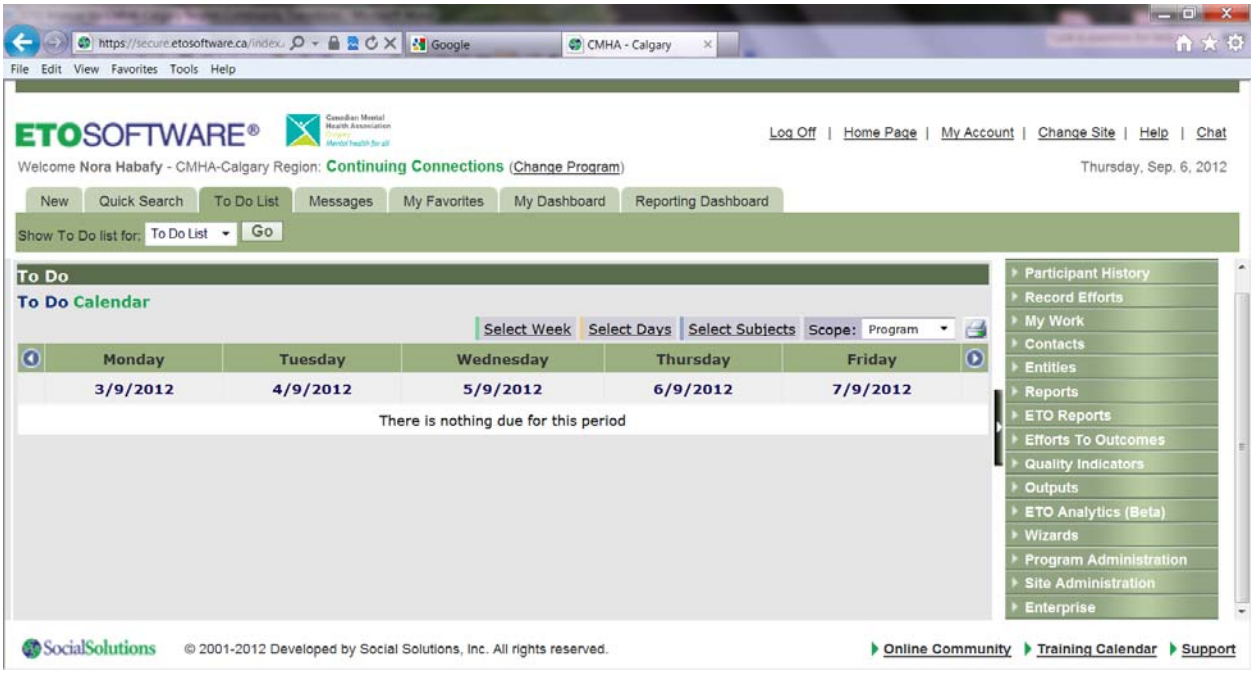
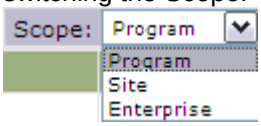
Open the Show drop box to switch the To Do List view.



The most popular view is the Calendar. The user can determine which days should appear (5 work days versus the full week), and can move through the calendar by using the arrows pointing to the left (past) and right (future).

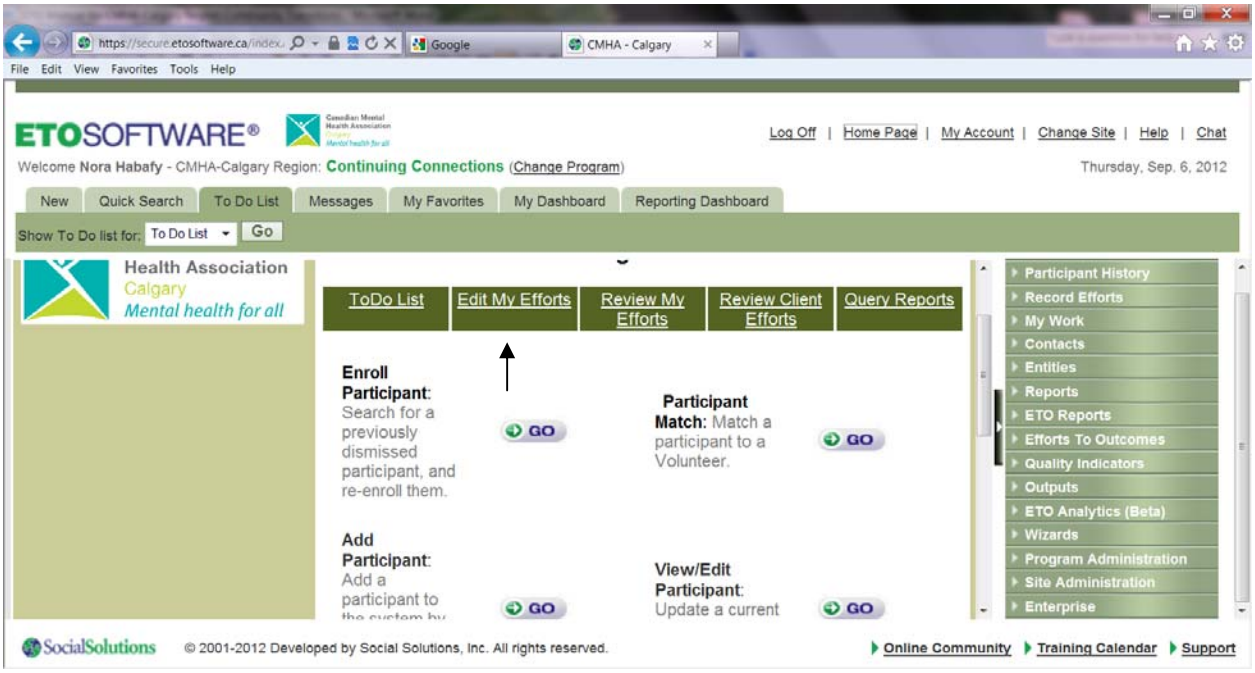


If you have entered efforts in more than one program, all reminders can be combined in one list by switching the Scope.



Editing your records (Efforts)

If you have made a mistake or did not finish entering a note, the Edit my Efforts feature will allow you to go back and update the effort with changes.
On your Program's Home Page, go to 'Edit My Efforts':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Log Off | Home Page | My Account | Change Site | Help | Chat
Welcome Nora Habafy - CMHA-Calgary Region: Continuing Connections (Change Program)
Thursday, Sep. 6, 2012
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Show To Do list for: To Do List Go
Health Association Calgary Mental health for all
ToDo List | Edit My Efforts | Review My Efforts | Review Client Efforts | Query Reports
Enroll Participant: Search for a previously dismissed participant, and re-enroll them. GO
Participant Match: Match a participant to a Volunteer. GO
Add Participant: Add a participant to GO
View/Edit Participant: Update a current GO
Participant History
Record Efforts
My Work
Contacts
Entities
Reports
ETO Reports
Efforts To Outcomes
Quality Indicators
Outputs
ETO Analytics (Beta)
Wizards
Program Administration
Site Administration
Enterprise
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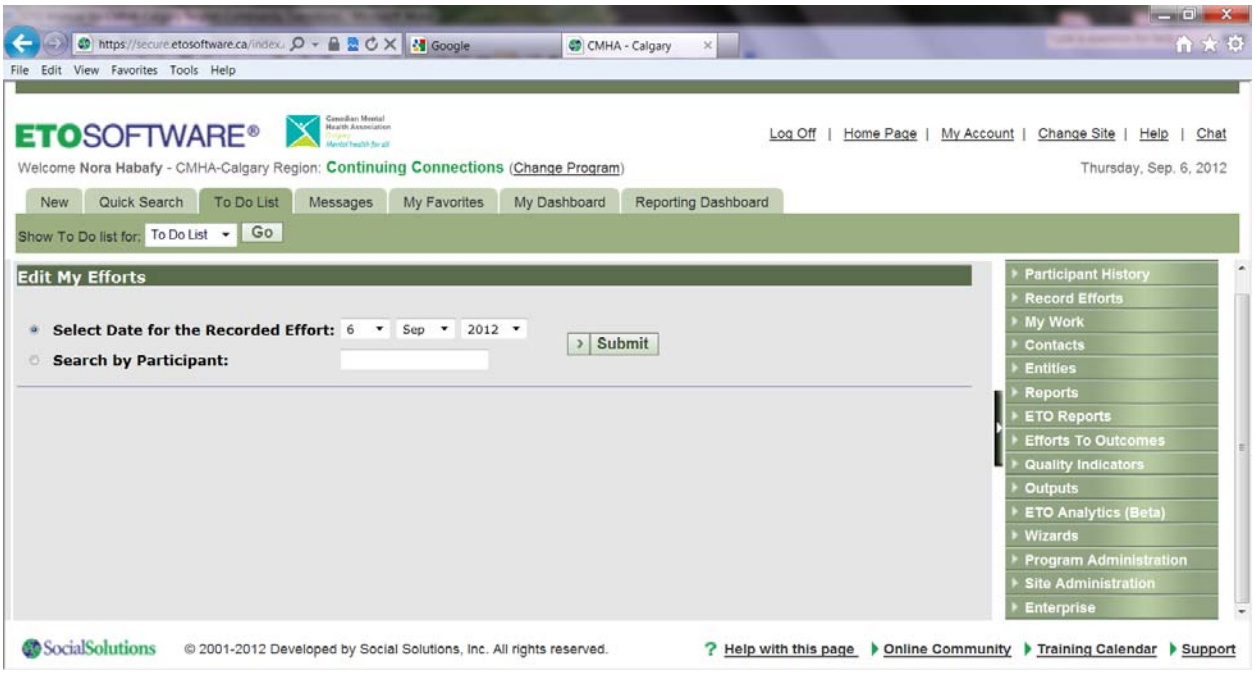
Efforts can be found based on the Date of Contact (often different than the date recorded), or by the Participant's last name.


ETOSOFTWARE®
Log Off | Home Page | My Account | Change Site | Help | Chat
Welcome Nora Habafy - CMHA-Calgary Region: Continuing Connections (Change Program)
Thursday, Sep. 6, 2012
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Show To Do list for: To Do List Go
Edit My Efforts
Select Date for the Recorded Effort: 6 Sep 2012 Submit
Search by Participant:
Participant History
Record Efforts
My Work
Contacts
Entities
Reports
ETO Reports
Efforts To Outcomes
Quality Indicators
Outputs
ETO Analytics (Beta)
Wizards
Program Administration
Site Administration
Enterprise
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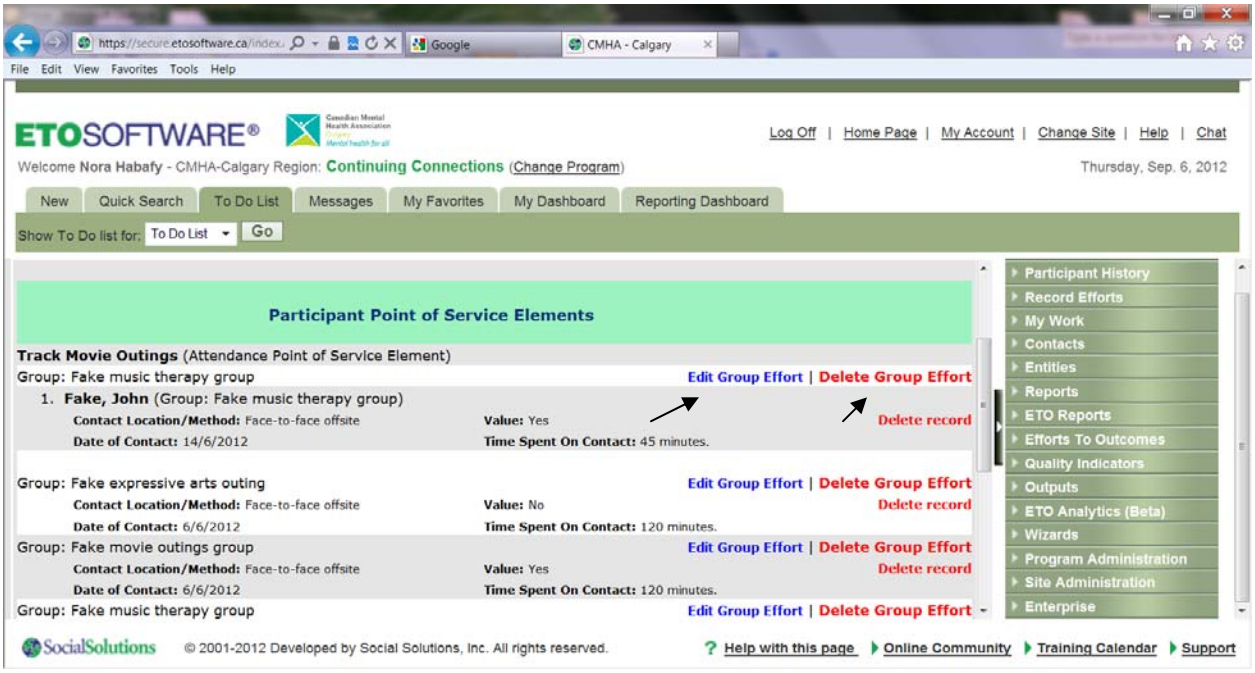
Click the blue link to edit the record, or the red link to delete the record (note that deleted records are completely erased from ETO).



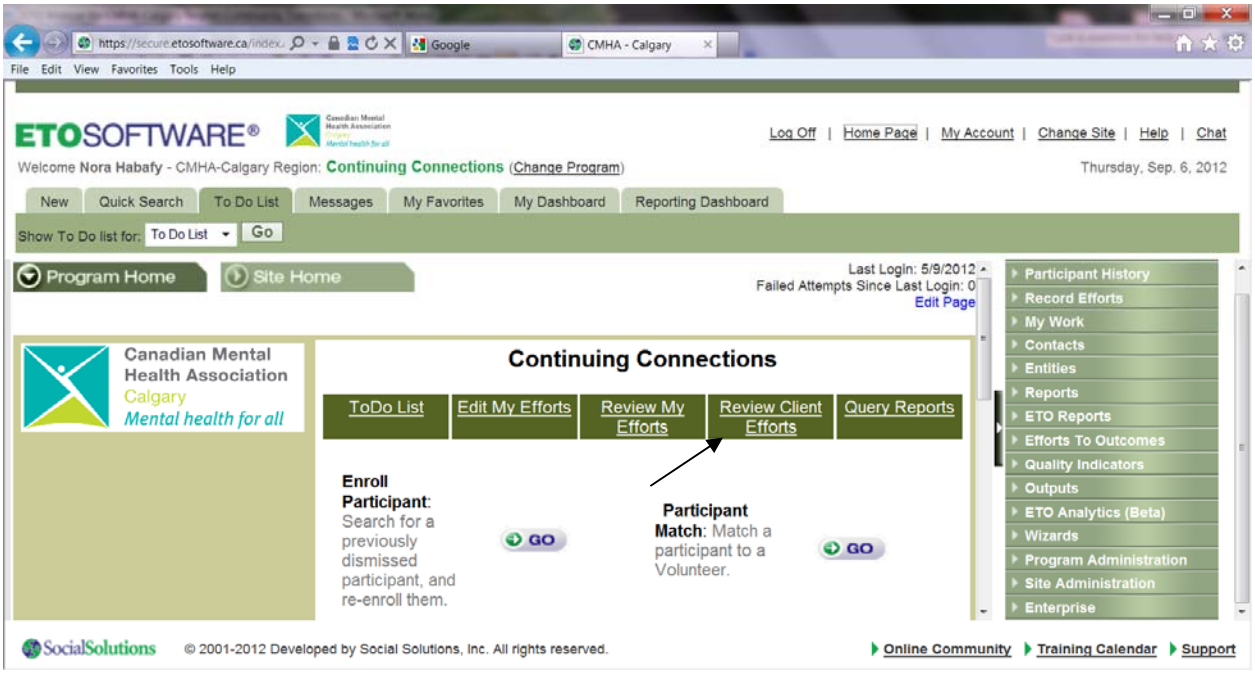
Make the changes and click Update Effort:

REVIEWING YOUR CLIENT'S EFFORTS INCLUDING THEIR ATTENDANCE IN GROUPS

Review Participant Efforts – The most popular report in ETO! It contains detailed data about a selected participant within a date range, including efforts, referrals, assessments, etc. The original view shows summary statistics. There is the option to drill down to see more details, such as case notes.

Review Participant Efforts in the context of ETO: "I run the Review Participant Efforts report to read about the efforts my colleagues recorded for participants we serve, which helps me to feel in the loop."

On your Program's Home Page, click on 'Review Client Efforts'.


ETOSOFTWARE®
Log Off | Home Page | My Account | Change Site | Help | Chat
Welcome Nora Habafy - CMHA-Calgary Region: Continuing Connections (Change Program)
Thursday, Sep. 6, 2012
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Show To Do list for: To Do List Go
Program Home | Site Home
Last Login: 5/9/2012
Failed Attempts Since Last Login: 0
Edit Page
Canadian Mental Health Association
Calgary
Mental health for all
Continuing Connections
ToDo List | Edit My Efforts | Review My Efforts | Review Client Efforts | Query Reports
Enroll Participant: Search for a previously dismissed participant, and re-enroll them.
GO
Participant Match: Match a participant to a Volunteer.
GO
Participant History
Record Efforts
My Work
Contacts
Entities
Reports
ETO Reports
Efforts To Outcomes
Quality Indicators
Outputs
ETO Analytics (Beta)
Wizards
Program Administration
Site Administration
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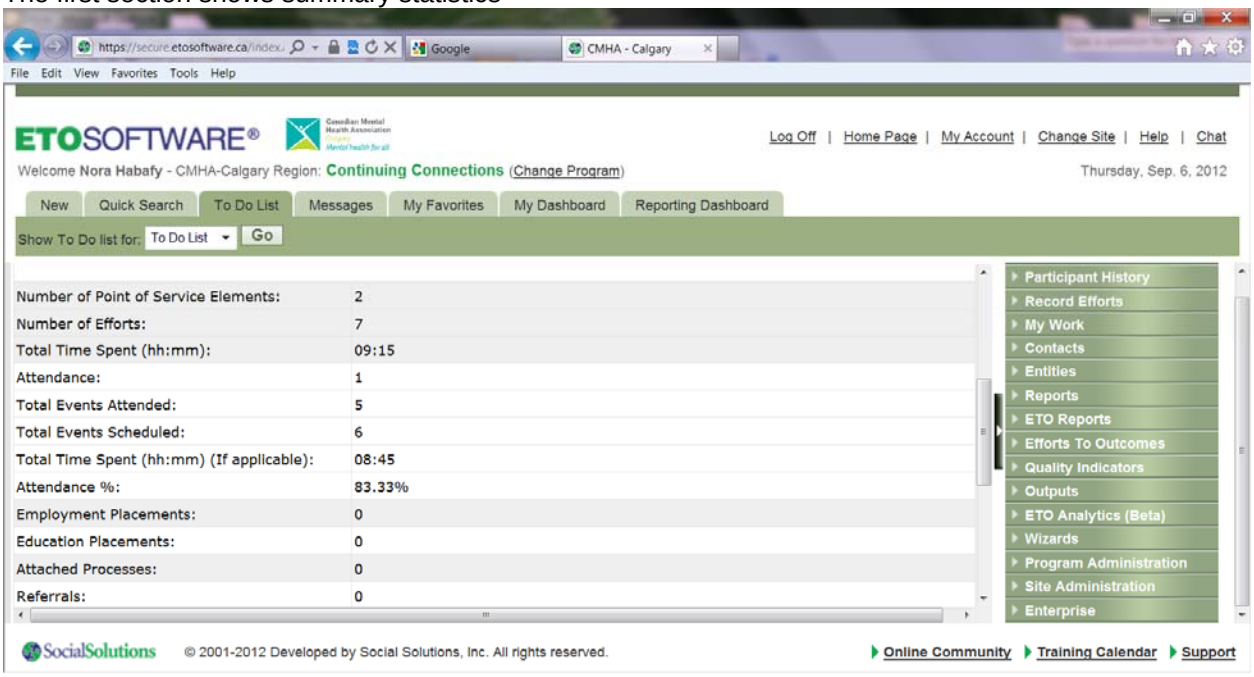
Once you have selected the client and a date range, this page will appear:
The first section shows summary statistics


ETOSOFTWARE®
Log Off | Home Page | My Account | Change Site | Help | Chat
Welcome Nora Habafy - CMHA-Calgary Region: Continuing Connections (Change Program)
Thursday, Sep. 6, 2012
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Show To Do list for: To Do List Go
Number of Point of Service Elements: 2
Number of Efforts: 7
Total Time Spent (hh:mm): 09:15
Attendance: 1
Total Events Attended: 5
Total Events Scheduled: 6
Total Time Spent (hh:mm) (If applicable): 08:45
Attendance %: 83.33%
Employment Placements: 0
Education Placements: 0
Attached Processes: 0
Referrals: 0
Participant History
Record Efforts
My Work
Contacts
Entities
Reports
ETO Reports
Efforts To Outcomes
Quality Indicators
Outputs
ETO Analytics (Beta)
Wizards
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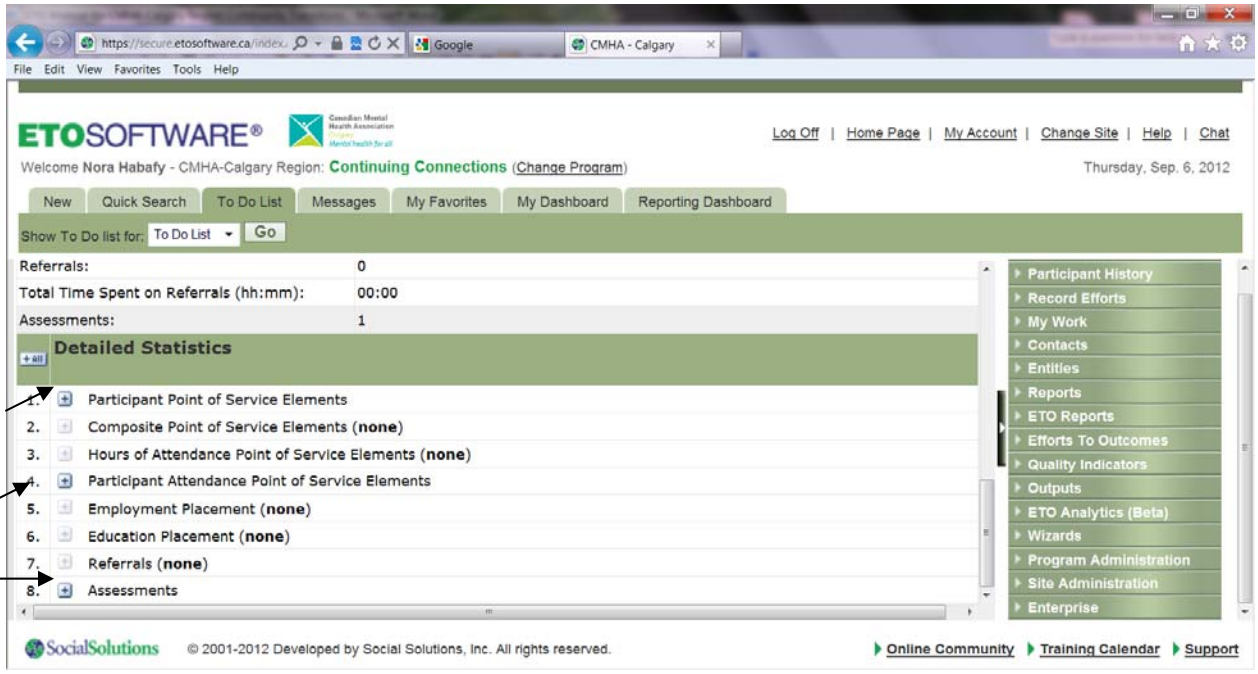
The second section shows detailed statistics. Click on the plus (+) sign to see the details and to see the notes.



RECORDING YOUR TIME NOT RELATED TO CLIENTS

General – Does not fit into the Participant or Entity category; both General Assessments and General Points of Service can be built into ETO.

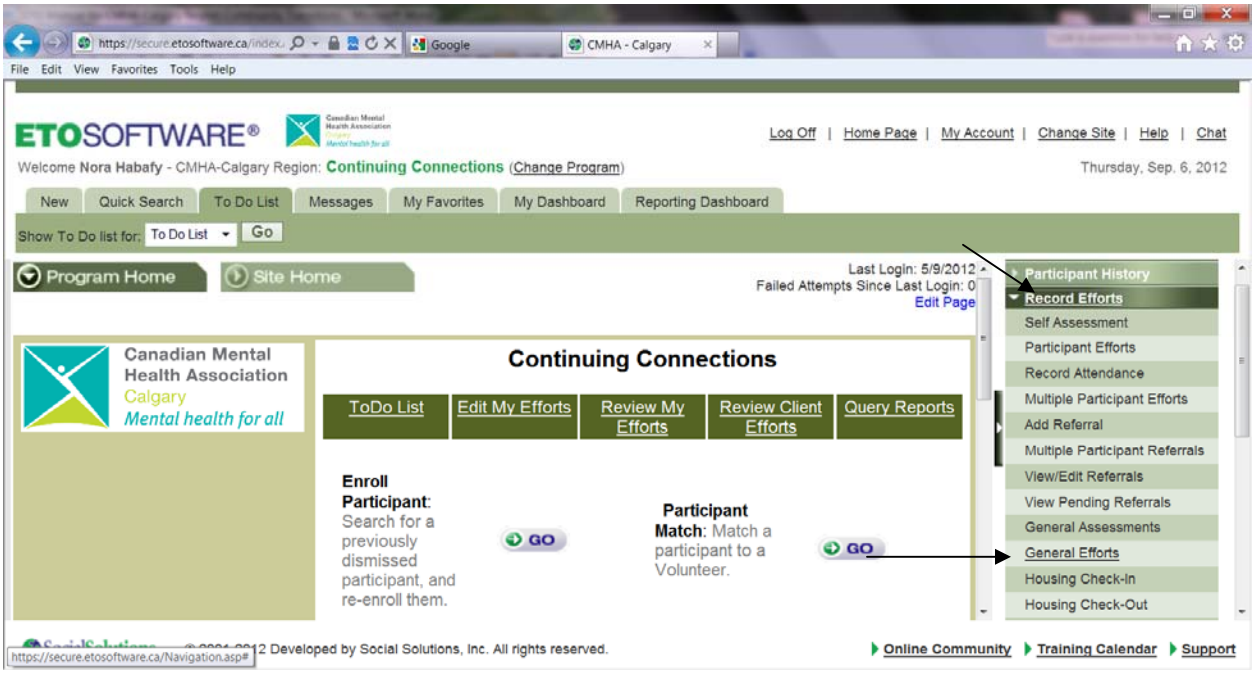
General in the context of ETO: "I track my work as an ETO Administrator in a General effort so that I can generate a report detailing how much time I spend working with the software."

The General Efforts for your Programs are:

- Program Presentations: To be used when you deliver a presentation about your Program to a community agency.
- Track Professional Development: To be used for tracking your attendance in workshops, conferences, agency tours etc. for your professional development.
- Track Consultation Sessions – Continuing Connections Program only
- Track Educational Sessions – Continuing Connections Program only

Feature to use: General Efforts.

Go to 'Record Efforts' on your Navigation bar, and then click on 'General Efforts'.


ETOSOFTWARE®
Log Off | Home Page | My Account | Change Site | Help | Chat
Welcome Nora Habafy - CMHA-Calgary Region: Continuing Connections (Change Program)
Thursday, Sep. 6, 2012
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Show To Do list for: To Do List Go
Program Home
Site Home
Last Login: 5/9/2012
Failed Attempts Since Last Login: 0
Edit Page
Canadian Mental Health Association
Calgary
Mental health for all
Continuing Connections
ToDo List | Edit My Efforts | Review My Efforts | Review Client Efforts | Query Reports
Enroll Participant: Search for a previously dismissed participant, and re-enroll them.
GO
Participant Match: Match a participant to a Volunteer.
GO
Participant History
Record Efforts
Self Assessment
Participant Efforts
Record Attendance
Multiple Participant Efforts
Add Referral
Multiple Participant Referrals
View/Edit Referrals
View Pending Referrals
General Assessments
General Efforts
Housing Check-In
Housing Check-Out
https://secure.etosoftware.ca/Navigation.asp#
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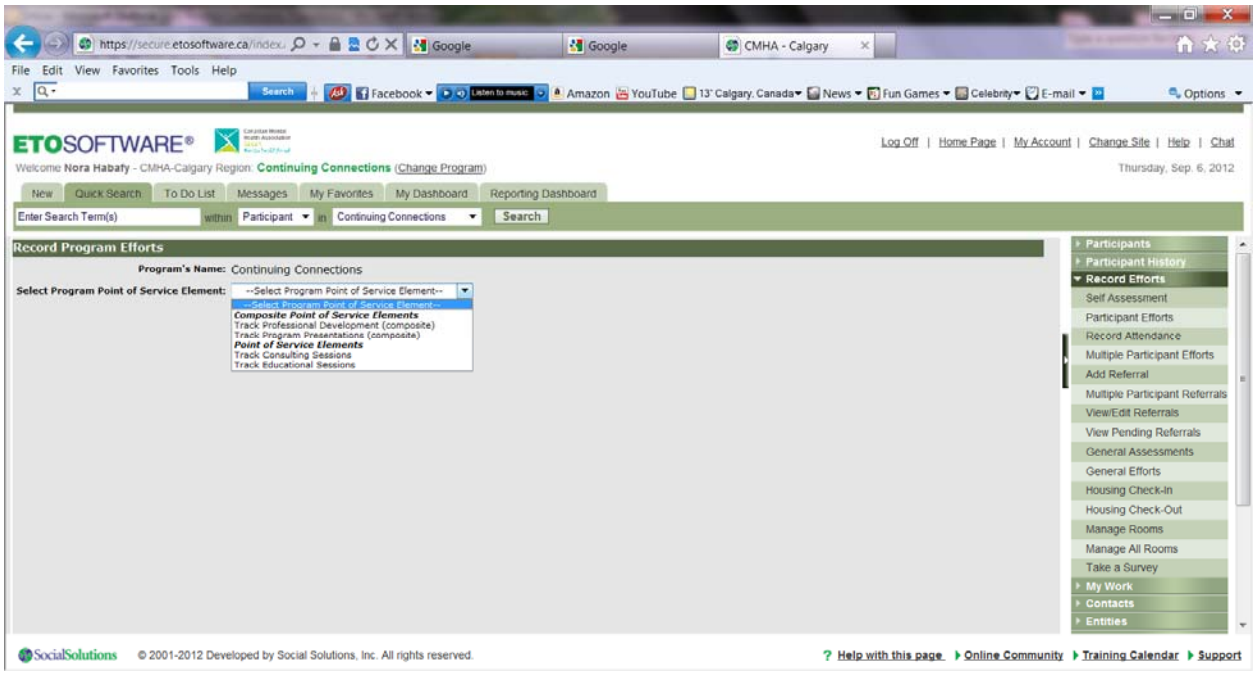
This page will appear:


ETOSOFTWARE®
Log Off | Home Page | My Account | Change Site | Help | Chat
Welcome Nora Habafy - CMHA-Calgary Region: Continuing Connections (Change Program)
Thursday, Sep. 6, 2012
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Enter Search Term(s) within Participant in Continuing Connections Search
Record Program Efforts
Program's Name: Continuing Connections
Select Program Point of Service Element: --Select Program Point of Service Element--
Composite Point of Service Elements
Track Professional Development (composite)
Track Program Presentations (composite)
Point of Service Elements
Track Consulting Sessions
Track Educational Sessions
Participants
Participant History
Record Efforts
Self Assessment
Participant Efforts
Record Attendance
Multiple Participant Efforts
Add Referral
Multiple Participant Referrals
View/Edit Referrals
View Pending Referrals
General Assessments
General Efforts
Housing Check-In
Housing Check-Out
Manage Rooms
Manage All Rooms
Take a Survey
My Work
Contacts
Entities
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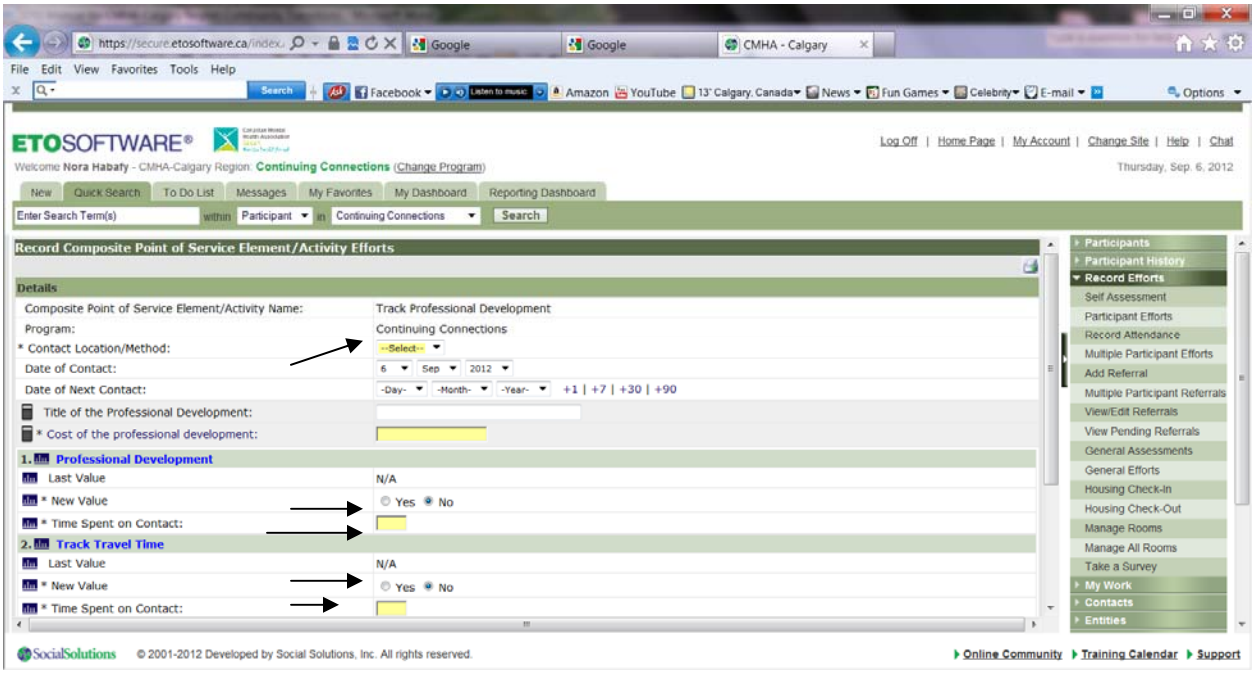
Select the appropriate Point of Service Element. This page will appear:



- Select the appropriate Contact Location/Method, Date of Contact, Date of Next Contact if desired (this will populate your To Do List for future contacts).
- Always click on "Yes' if the activity (e.g.: professional development, program presentation) happened and click on 'No' if an activity (e.g. and in particular, travel time) did not happen. If you select 'No', input 0 for 'Time spent on Contact'.
- The notes box has a limit of 7,250 characters.
- Click Save Effort & Close to submit or Save & Record Similar Effort to submit and record an additional effort with the same program.

RECORDING ASSESSMENTS LINKED TO A CLIENT (Participant Assessments)

Assessment - A data collection tool in ETO. It can be used as a continuation for demographic data, like in an extensive intake form, or it can be used as a questionnaire that track knowledge, belief, attitude, and/or behavior that is completed more than one time and allow for comparative analysis to determine the impact of services.

For your Programs, the Participant Assessments are:

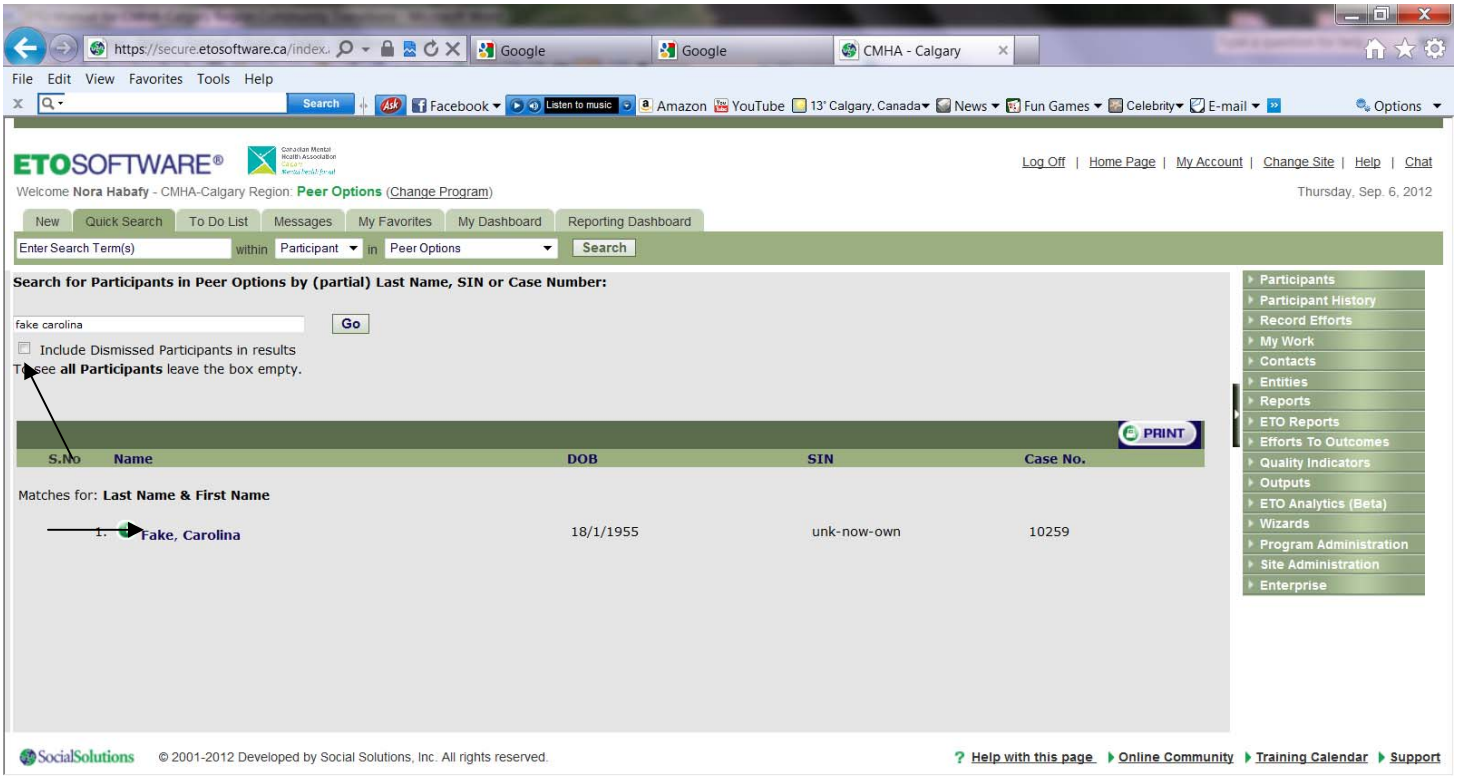
- Art of Friendship Pre and Post Tests
- Leisure Competence Measure
- Critical Incident Report
- Discharge Information Assessment without housing item (Except Leisure Recreation Program)

Feature to use: Participant Assessment

This feature allows for Participant Assessments to be taken, updated, and reviewed. Additionally, individual participant reporting options are available on this page.

There are three ways to access participant assessment:

- In the Program's Home Page ('Participant Assessment' link)
- In the client's file (Participant Dashboard)
- On your Navigation Bar (Go to 'Participant History' and then click on Participant Assessment'
- Search for Participant by Last Name, SSN or Case Number and click on their name to select. Note that dismissed Participants can be included in the search if the check box is clicked. Select the name of a Participant.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Log Off | Home Page | My Account | Change Site | Help | Chat
Welcome Nora Habafy - CMHA-Calgary Region: Peer Options (Change Program)
Thursday, Sep. 6, 2012
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Enter Search Term(s) within Participant in Peer Options Search
Search for Participants in Peer Options by (partial) Last Name, SIN or Case Number:
fake carolina
Go
Include Dismissed Participants in results
To see all Participants leave the box empty.
PRINT
S.No Name DOB SIN Case No.
Matches for: Last Name & First Name
1. Fake, Carolina 18/1/1955 unk-now-own 10259
Participants
Participant History
Record Efforts
My Work
Contacts
Entities
Reports
ETO Reports
Efforts To Outcomes
Quality Indicators
Outputs
ETO Analytics (Beta)
Wizards
Program Administration
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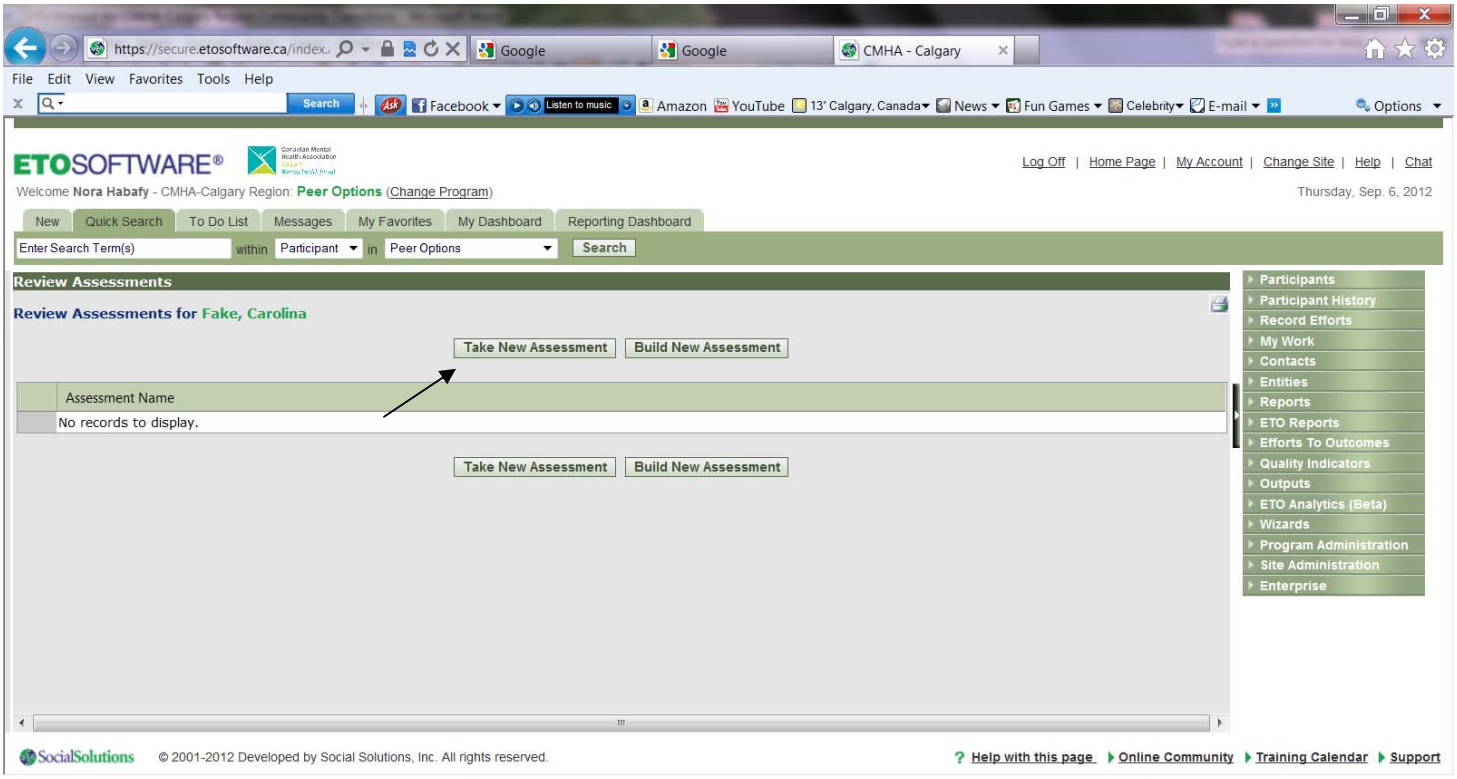
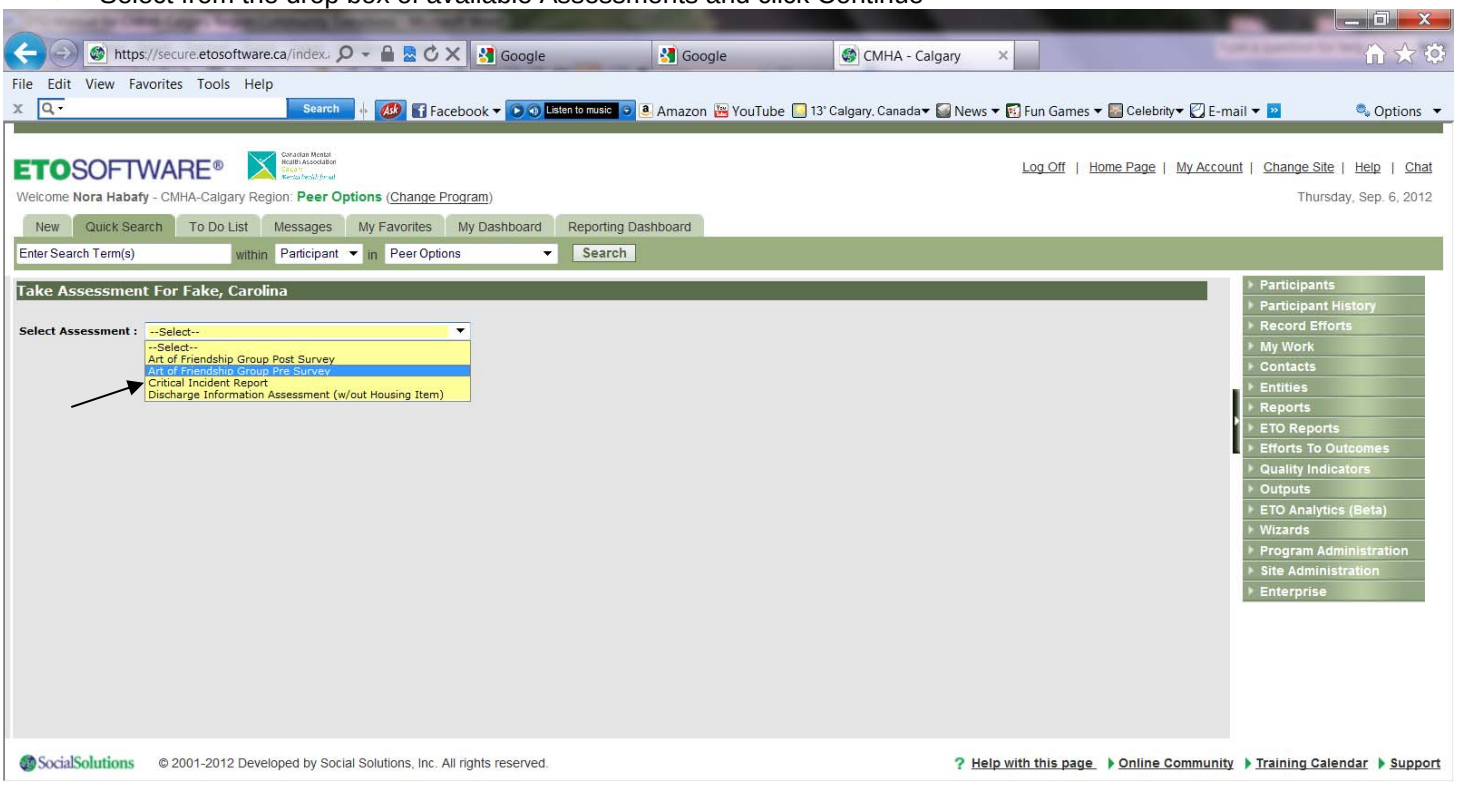
To enter new assessment information, click the **"Take New Assessment"** button.



- Select from the drop box of available Assessments and click Continue


ETOSOFTWARE®
Welcome Nora Habafy - CMHA-Calgary Region: Peer Options (Change Program)
Thursday, Sep. 6, 2012
Log Off | Home Page | My Account | Change Site | Help | Chat
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Enter Search Term(s) within Participant in Peer Options Search
Take Assessment For Fake, Carolina
Select Assessment : --Select--
--Select--
Art of Friendship Group Post Survey
Art of Friendship Group Pre Survey
Critical Incident Report
Discharge Information Assessment (w/out Housing Item)
Participants
Participant History
Record Efforts
My Work
Contacts
Entities
Reports
ETO Reports
Efforts To Outcomes
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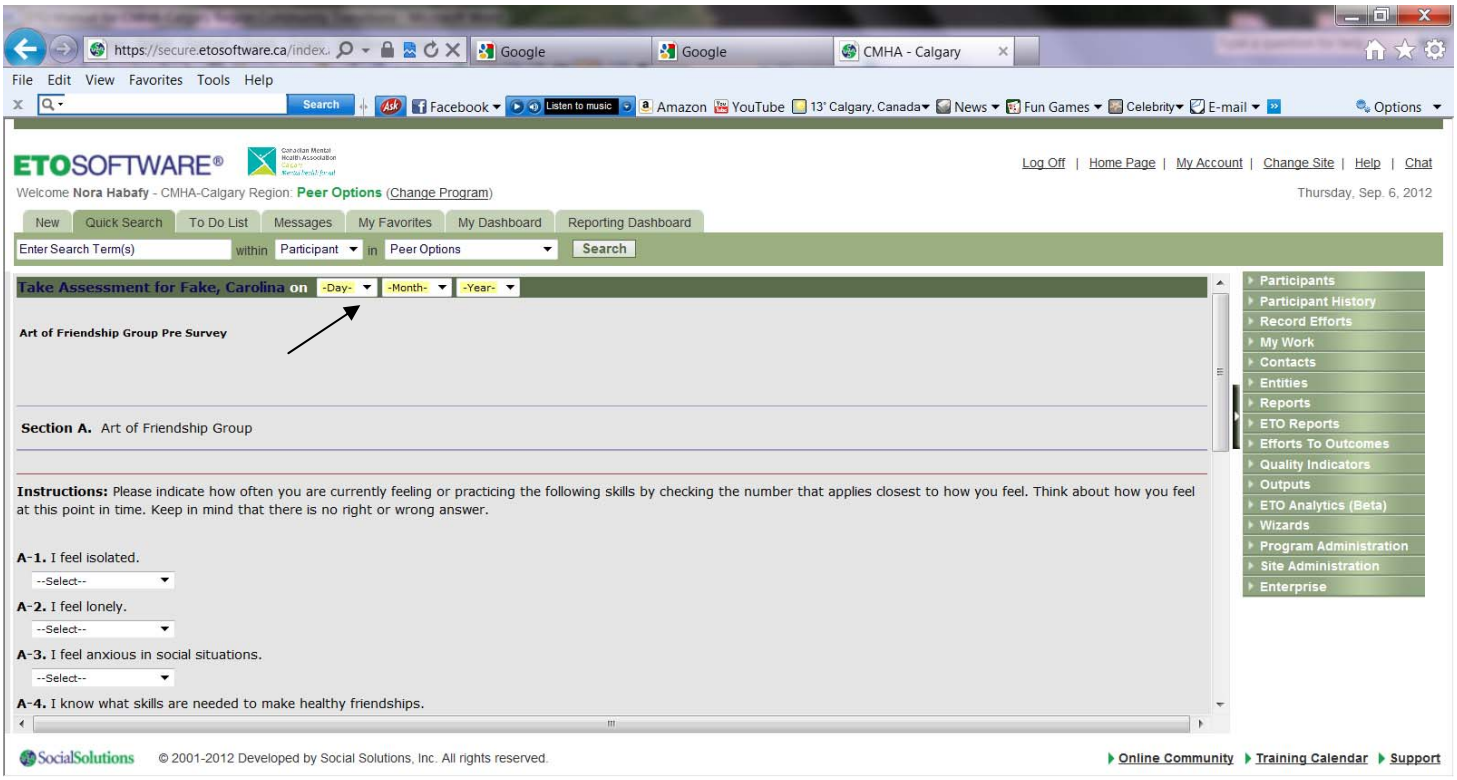
- Enter the assessment date at top of screen.


ETOSOFTWARE®
Welcome Nora Habafy - CMHA-Calgary Region: Peer Options (Change Program)
Thursday, Sep. 6, 2012
Log Off | Home Page | My Account | Change Site | Help | Chat
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Enter Search Term(s) within Participant in Peer Options Search
Take Assessment for Fake, Carolina on -Day- -Month- -Year-
Art of Friendship Group Pre Survey
Section A. Art of Friendship Group
Instructions: Please indicate how often you are currently feeling or practicing the following skills by checking the number that applies closest to how you feel. Think about how you feel at this point in time. Keep in mind that there is no right or wrong answer.
A-1. I feel isolated.
--Select--
A-2. I feel lonely.
--Select--
A-3. I feel anxious in social situations.
--Select--
A-4. I know what skills are needed to make healthy friendships.
Participants
Participant History
Record Efforts
My Work
Contacts
Entities
Reports
ETO Reports
Efforts To Outcomes
Quality Indicators
Outputs
ETO Analytics (Beta)
Wizards
Program Administration
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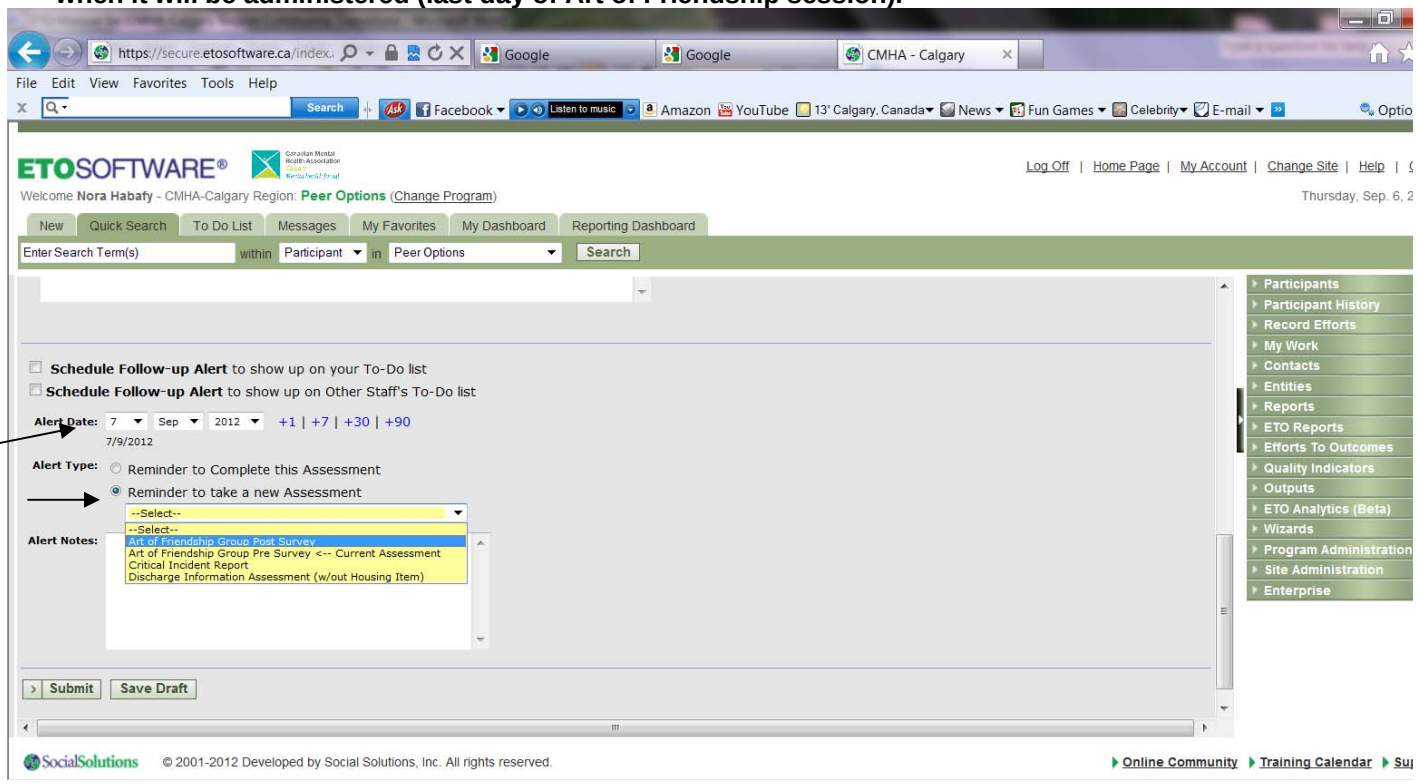
- Complete assessment elements as desired.

- If helpful, “Schedule Assessment Follow-up Alert”, which allows you to create an alert on your To Do List. Check the box and complete the Alert Date, Alert Type and Alert Notes (optional). You can create a reminder to take a new assessment or complete the current assessment. You can also create a reminder for another staff person to complete the assessment. **This is especially useful for the Art of Friendship Post-Test when you know when it will be administered (last day of Art of Friendship session).**


ETOSOFTWARE®
Log Off | Home Page | My Account | Change Site | Help
Welcome Nora Habafy - CMHA-Calgary Region: Peer Options (Change Program)
Thursday, Sep. 6, 2
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Enter Search Term(s) within Participant in Peer Options Search
Schedule Follow-up Alert to show up on your To-Do list
Schedule Follow-up Alert to show up on Other Staff's To-Do list
Alert Date: 7 Sep 2012 +1 | +7 | +30 | +90
7/9/2012
Alert Type:
Reminder to Complete this Assessment
Reminder to take a new Assessment
--Select--
Alert Notes:
--Select--
Art of Friendship Group Post Survey
Art of Friendship Group Pre Survey <-- Current Assessment
Critical Incident Report
Discharge Information Assessment (w/out Housing Item)
Submit
Save Draft
Participants
Participant History
Record Efforts
My Work
Contacts
Entities
Reports
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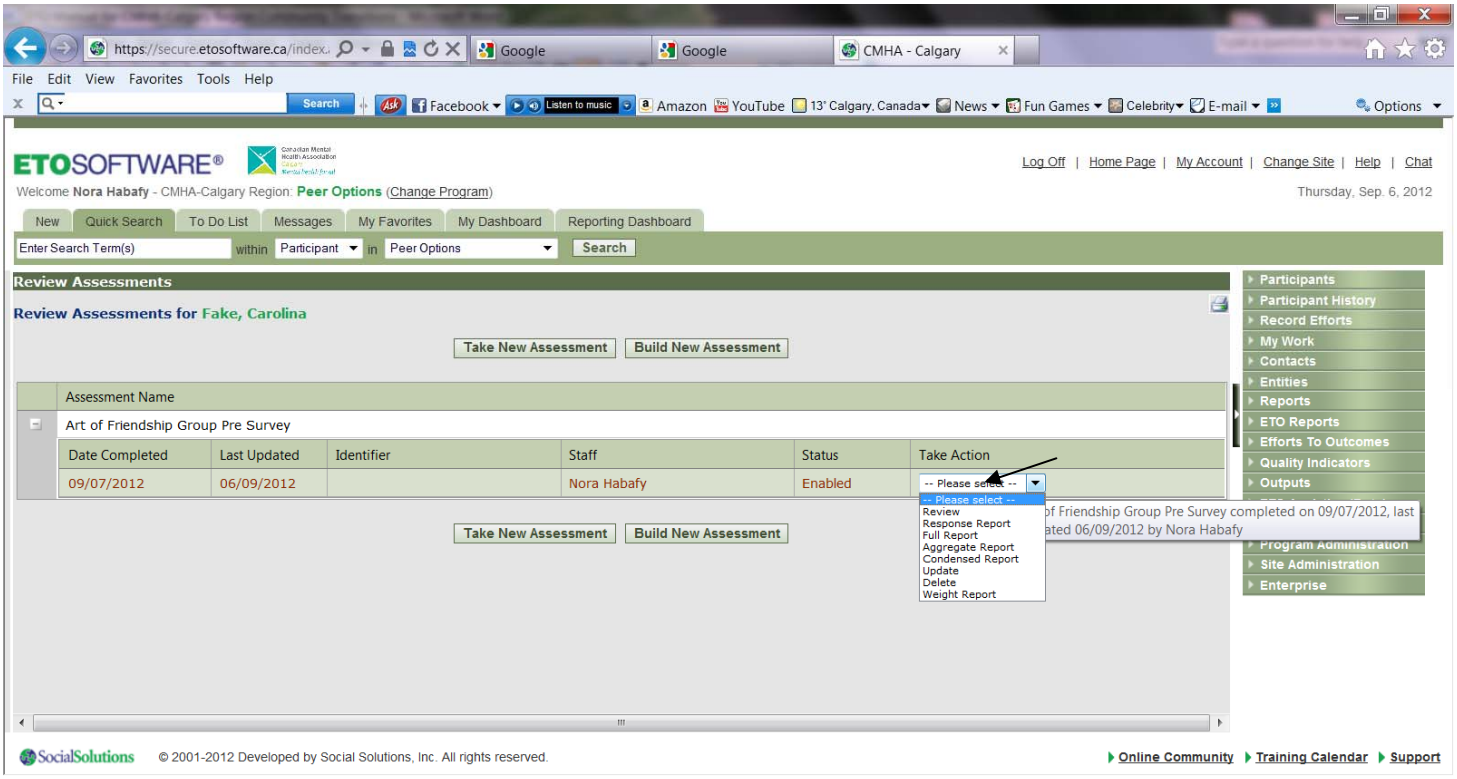
- Click on “Submit” to save your information. We do not recommend you to ‘Save Draft’ because if you do not go back to complete the assessment and submit it, the assessment data will not show up in aggregate reports.
- After submitting, the response review screen will generate, along with a confirmation that the assessment has been submitted in the system. The next screen will allow for review of answers and a link to go back to make edits if necessary. If a response needs to be modified, click “Edit” and you will be able to make those edits.
- Click **Continue** to return to the Participant Assessment screen, where a list of options appears in the **Take Action** list.


ETOSOFTWARE®
Log Off | Home Page | My Account | Change Site | Help | Chat
Welcome Nora Habafy - CMHA-Calgary Region: Peer Options (Change Program)
Thursday, Sep. 6, 2012
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Enter Search Term(s) within Participant in Peer Options Search
Review Assessments
Review Assessments for Fake, Carolina
Take New Assessment | Build New Assessment
Assessment Name
Art of Friendship Group Pre Survey
Date Completed | Last Updated | Identifier | Staff | Status | Take Action
09/07/2012 | 06/09/2012 | | Nora Habafy | Enabled | -- Please select --
-- Please select --
Review
Response Report
Full Report
Aggregate Report
Condensed Report
Update
Delete
Weight Report
Take New Assessment | Build New Assessment
Participants
Participant History
Record Efforts
My Work
Contacts
Entities
Reports
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1. Review – shows a read only version of your assessment data. This is helpful if you are unable to run Crystal Reports on your computer.
2. Response Report – a Crystal Report containing a print out of all assessment questions that were answered and the answers to those questions.
3. Full Report – a Crystal Report containing all questions, choices, and selected answers in the assessment, including those that were not answered.
4. Aggregate Report – a Crystal Report for assessments that have been completed multiple times for the selected participant. The report aggregates the data entered into those assessments.
5. Condensed Report – a Crystal Report that is abbreviated because the large header only appears on page 1.
6. Update – allows edits to an existing assessment.
7. Delete – this option is only available to Site Administrators and deletes the entire selected individual assessment.

RECORDING SURVEYS NOT LINKED TO A CLIENT

For your Programs the Surveys are:

Peer Options:
- Evaluation for Art of Friendship
- Circle of Friends Questionnaire

Leisure Recreation:
- Leisure Recreation Program Client Satisfaction Questionnaire

Continuing Connections :
- Continuing Connections Client Questionnaire

There are two ways to access 'Take a Survey'
- On your Program's Home Page: Click on Go next to 'Take a Survey'
- On your navigation bar: Go to Record Efforts and then click on 'Take a Survey'.

- Select the desired survey from the list and click Continue.

- If applicable, change survey date at top of screen
- Complete survey elements as desired.
- Schedule Assessment Follow-up Alert: N/A for Surveys. Leave blank.
- Submit to save your information. We do not recommend you to 'Save Draft' because if you do not go back to complete the assessment and submit it, the assessment data will not show up in aggregate reports.
- After submitting, you will come to the response review screen. You will receive a confirmation that your assessment has been submitted in the system. The next screen will allow you to review your answers and go back to make edits if necessary. If you need to edit a response, click Edit and you will be able to make those edits.

Click Continue to move on to the next screen where you will have the following options:

1. **Review** - shows a read-only version of your assessment data. This is helpful if you are unable to run Crystal Reports on your computer.
2. **Update** - allows you to go back and edit the assessment data. This option will not be available if the Site Administrator has set up the assessment to prevent updates.
3. **Report** - a Crystal Report containing a print out of all assessment questions that were answered and the answers to those questions.
4. **Print** - a Crystal Report containing all questions and answers in the assessment, including those that were not answered.
5. **Delete** - this option is only available to Site Administrator and allows you to delete one individual assessment response at a time.

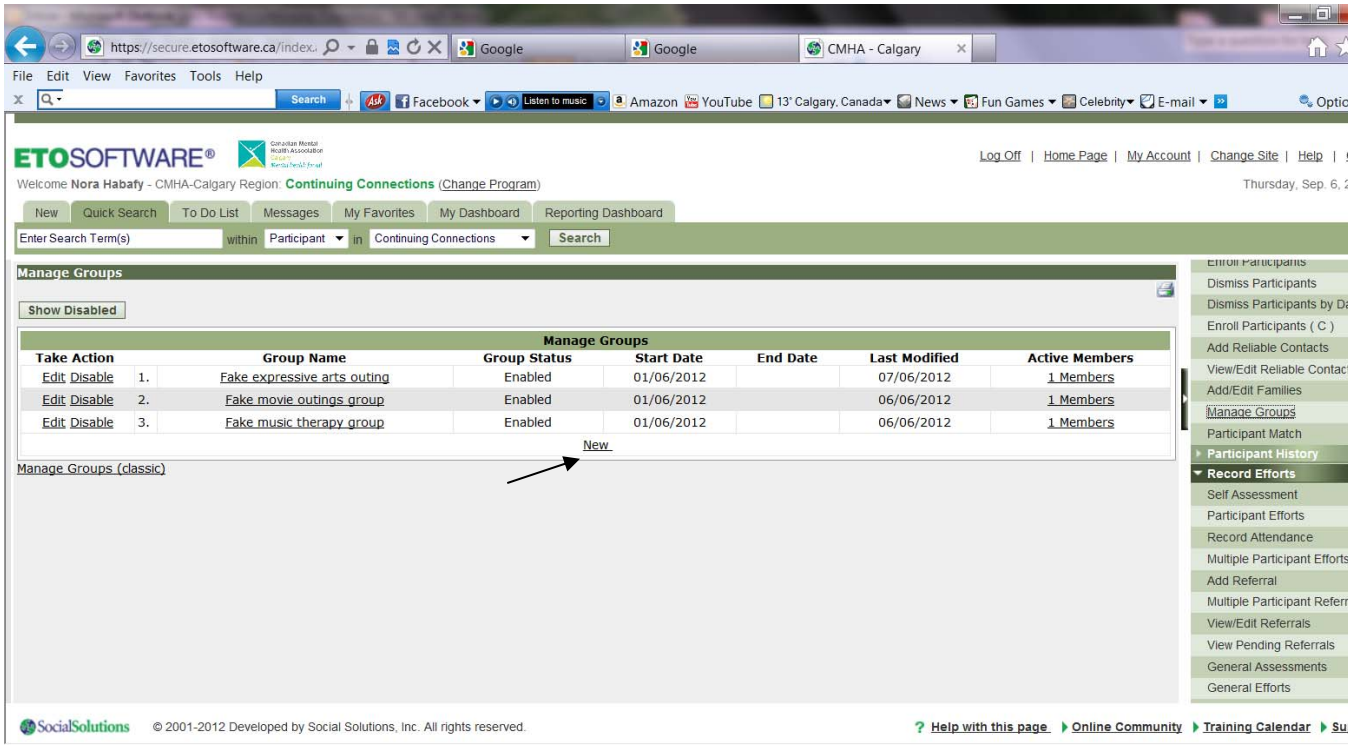
ADDING GROUPS AND REGISTERING CLIENTS IN YOUR PROGRAM'S GROUPS

Feature to use: Manage Groups
A group is a defined subset of participants active in the selected program. A subset of participants who receive services simultaneously. Basically, a roster. Groups can be set up to start and end on specific dates (such as seasonally occurring activities/classes), or to be continually active (such as support groups), with participants rotating in and out of the group.

The Manage Groups feature allows for the creation of rosters of individual participants that *meet together regularly* over time. This is especially true if there is an expectation for each participant to show up to an activity, versus a drop-in event. Creating groups makes tracking attendance and other point of service elements tracked for a group much easier.

FOR MANAGER ONLY: To add a new group, follow these steps:

- On your Navigation Bar, go to 'Participants' and then 'Manage groups'
- Click the New button on the bottom of the Manage Groups page


ETOSOFTWARE®
Welcome Nora Habafy - CMHA-Calgary Region: Continuing Connections (Change Program)
Log Off | Home Page | My Account | Change Site | Help |
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Enter Search Term(s) within Participant in Continuing Connections Search
Manage Groups
Show Disabled
Manage Groups
Take Action | Group Name | Group Status | Start Date | End Date | Last Modified | Active Members
Edit Disable 1. Fake expressive arts outing Enabled 01/06/2012 07/06/2012 1 Members
Edit Disable 2. Fake movie outings group Enabled 01/06/2012 06/06/2012 1 Members
Edit Disable 3. Fake music therapy group Enabled 01/06/2012 06/06/2012 1 Members
New
Manage Groups (classic)
Dismiss Participants
Dismiss Participants by Da
Enroll Participants (C)
Add Reliable Contacts
View/Edit Reliable Contac
Add/Edit Families
Manage Groups
Participant Match
Participant History
Record Efforts
Self Assessment
Participant Efforts
Record Attendance
Multiple Participant Efforts
Add Referral
Multiple Participant Referr
View/Edit Referrals
View Pending Referrals
General Assessments
General Efforts
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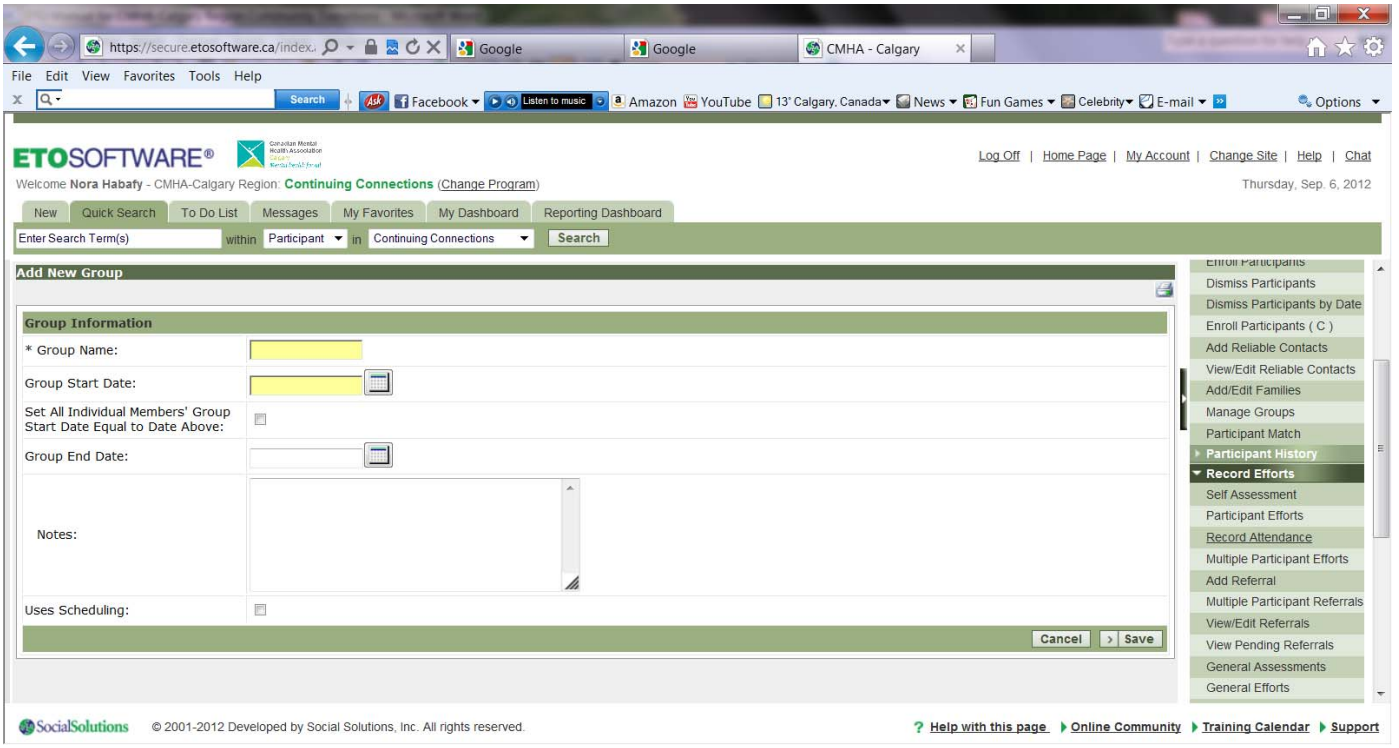
Help with this page Online Community Training Calendar

This page will appear:


ETOSOFTWARE®
Welcome Nora Habafy - CMHA-Calgary Region: Continuing Connections (Change Program)
Log Off | Home Page | My Account | Change Site | Help | Chat
Thursday, Sep. 6, 2012
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Enter Search Term(s) within Participant in Continuing Connections Search
Add New Group
Group Information
* Group Name:
Group Start Date:
Set All Individual Members' Group Start Date Equal to Date Above:
Group End Date:
Notes:
Uses Scheduling:
Cancel Save
Dismiss Participants
Dismiss Participants by Date
Enroll Participants (C)
Add Reliable Contacts
View/Edit Reliable Contacts
Add/Edit Families
Manage Groups
Participant Match
Participant History
Record Efforts
Self Assessment
Participant Efforts
Record Attendance
Multiple Participant Efforts
Add Referral
Multiple Participant Referrals
View/Edit Referrals
View Pending Referrals
General Assessments
General Efforts
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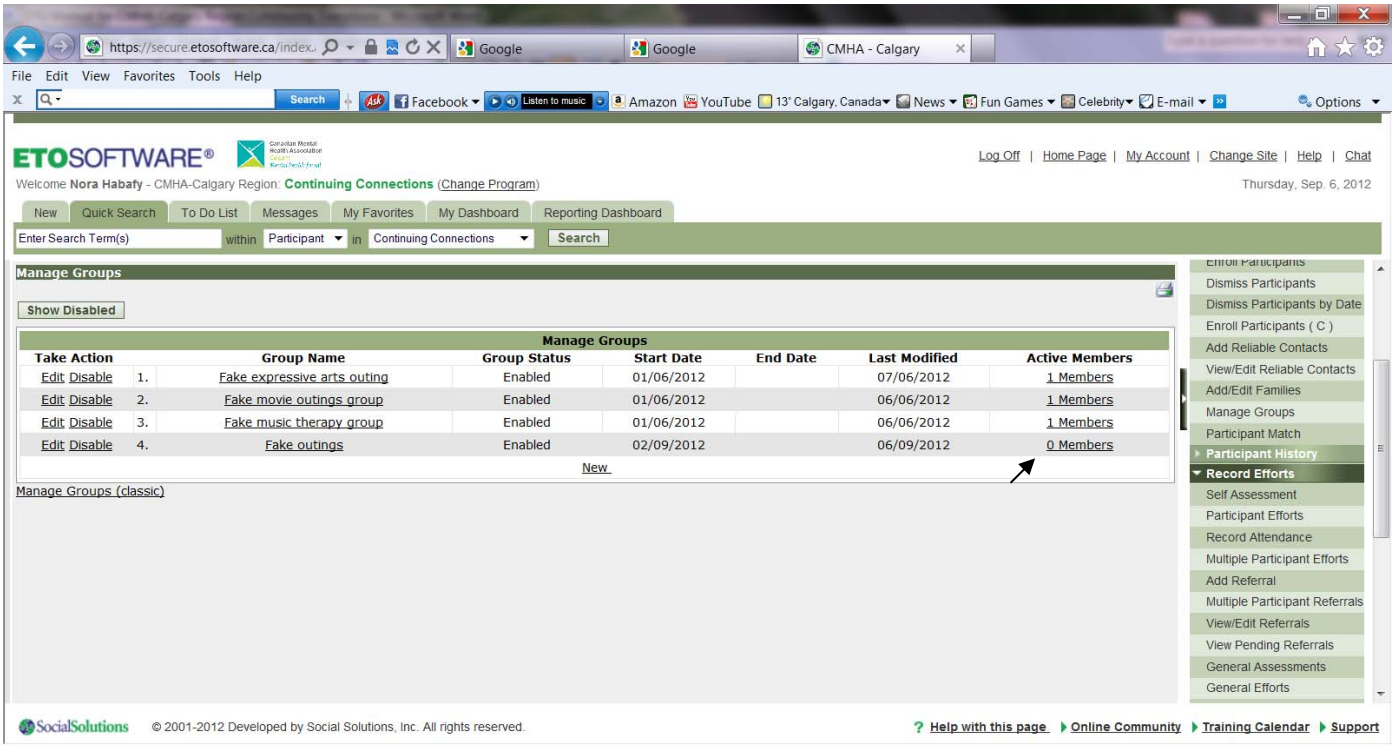
- Group Name: Enter a name for the group.
- Disabled: Select if this group is not yet active. This option is rarely used at the time of a group's creation. Groups can easily be disabled and re-enabled once created.
- Start Date: Note that ETO will prevent attendance data for the group from being entered prior to the group

start date. For this reason, it is important if the group started in the past, the start date is backdated.

- Set All Individual Members' Group Start Date Equal to Date Above: If this box is not checked, member start dates will default to the date they are added to the group (today). Member group start date can be edited individually if this box is checked. **NOTE:** If this box is checked for an existing group, the start date for the current members will not change. Checking this box will only impact new members added to the group.
- End Date: The group will not be available for recording efforts after its end date (including for back data entry).
- Group Description: Text will show up under the title of the group on the Manage Groups screen.
- Uses Scheduling: Not Applicable.

Adding Participant Members to a Group:

Once you've added a new group, click on 0 Members, where you can add active participants in the selected Program.


ETOSOFTWARE®
Log Off | Home Page | My Account | Change Site | Help | Chat
Welcome Nora Habafy - CMHA-Calgary Region: Continuing Connections (Change Program)
Thursday, Sep. 6, 2012
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Enter Search Term(s) within Participant in Continuing Connections Search
Manage Groups
Show Disabled
Manage Groups
Take Action | Group Name | Group Status | Start Date | End Date | Last Modified | Active Members
Edit Disable 1. Fake expressive arts outing | Enabled | 01/06/2012 | | 07/06/2012 | 1 Members
Edit Disable 2. Fake movie outings group | Enabled | 01/06/2012 | | 06/06/2012 | 1 Members
Edit Disable 3. Fake music therapy group | Enabled | 01/06/2012 | | 06/06/2012 | 1 Members
Edit Disable 4. Fake outings | Enabled | 02/09/2012 | | 06/09/2012 | 0 Members
New
Manage Groups (classic)
Dismiss Participants
Dismiss Participants by Date
Enroll Participants (C)
Add Reliable Contacts
View/Edit Reliable Contacts
Add/Edit Families
Manage Groups
Participant Match
Participant History
Record Efforts
Self Assessment
Participant Efforts
Record Attendance
Multiple Participant Efforts
Add Referral
Multiple Participant Referrals
View/Edit Referrals
View Pending Referrals
General Assessments
General Efforts
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Use the search bar to search for specific participant's names or click Go to view a list of all available participants in your program.

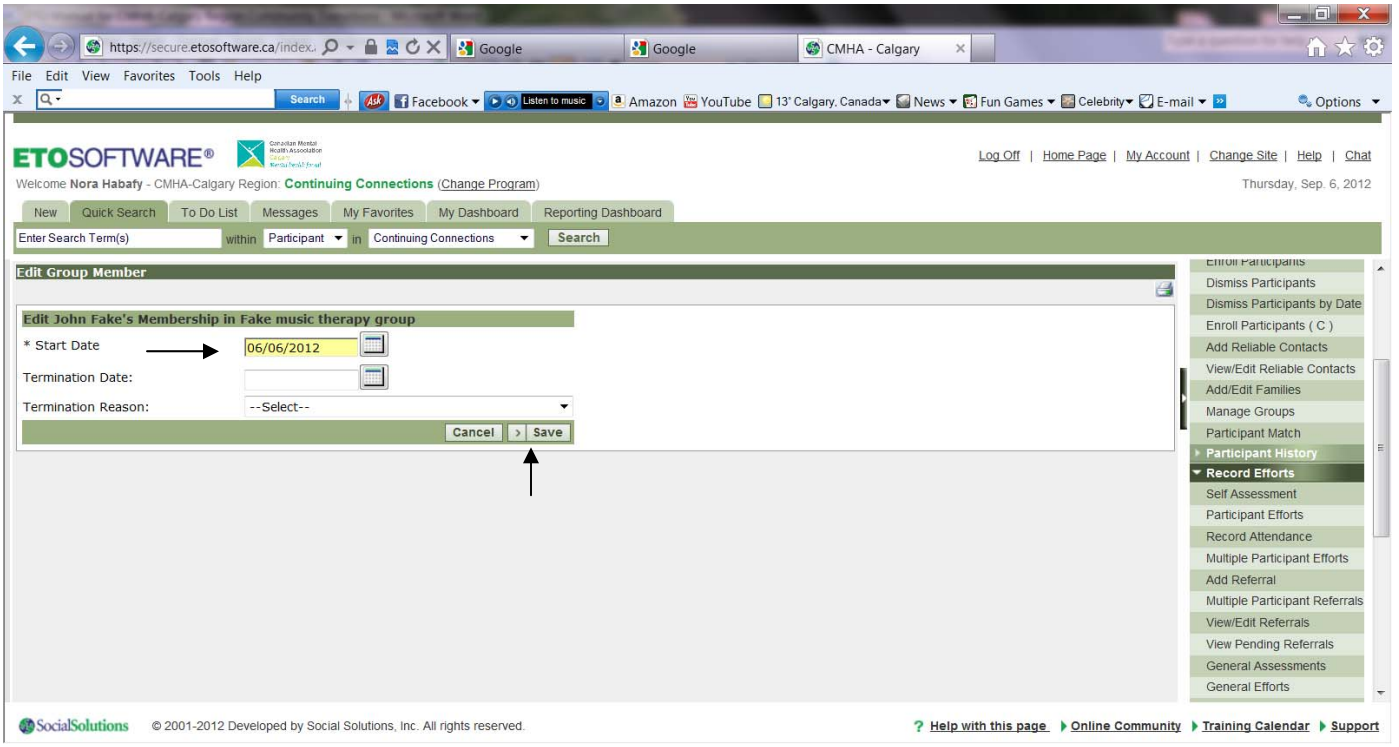
Click Add next to the desired participant(s). (If a participant is already a member of another group, you will see their Existing Groups below their name)

Each participant's start date in the group appears next to his name. This start date may or may not match the group start date, depending on the setting on the Add New Group page, and whether the date has been edited.

Click Edit next to the client's name in the group to change the Start Date, Termination Date, or Termination Reason (depending) and click on 'Save'.

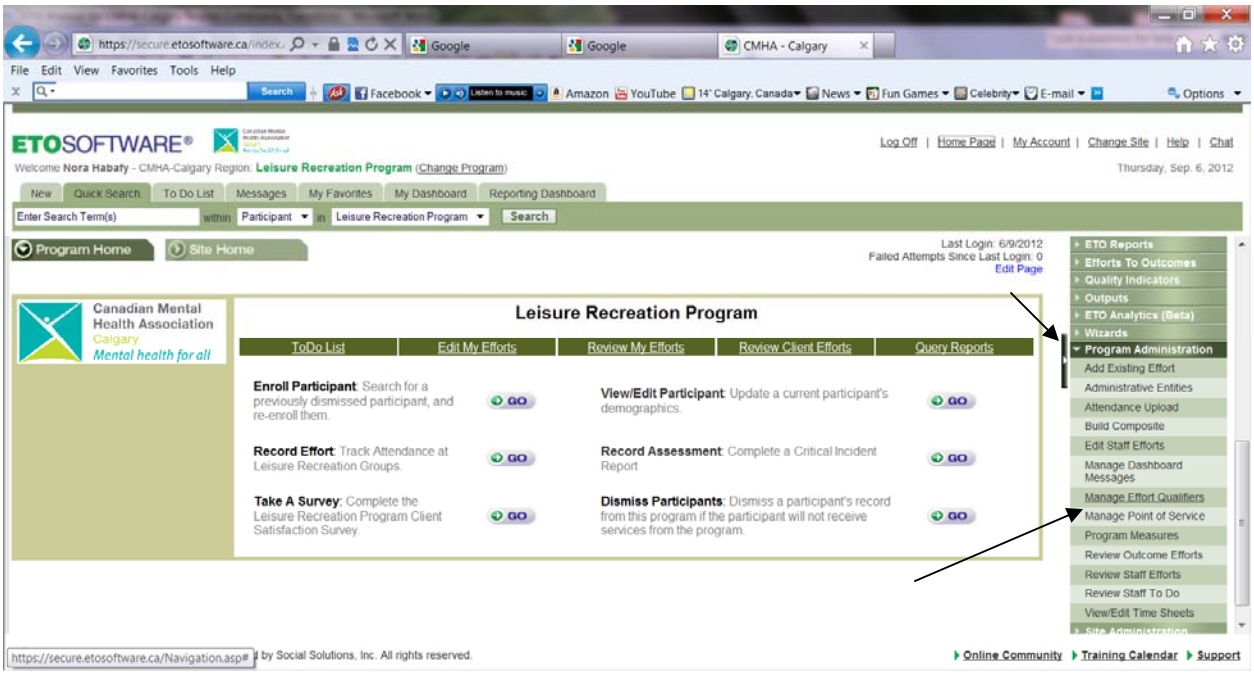
Participants in Fake music therapy group:

Take Action	Participant Name	Group Start Date
Edit Remove	Fake, John	06/06/2012

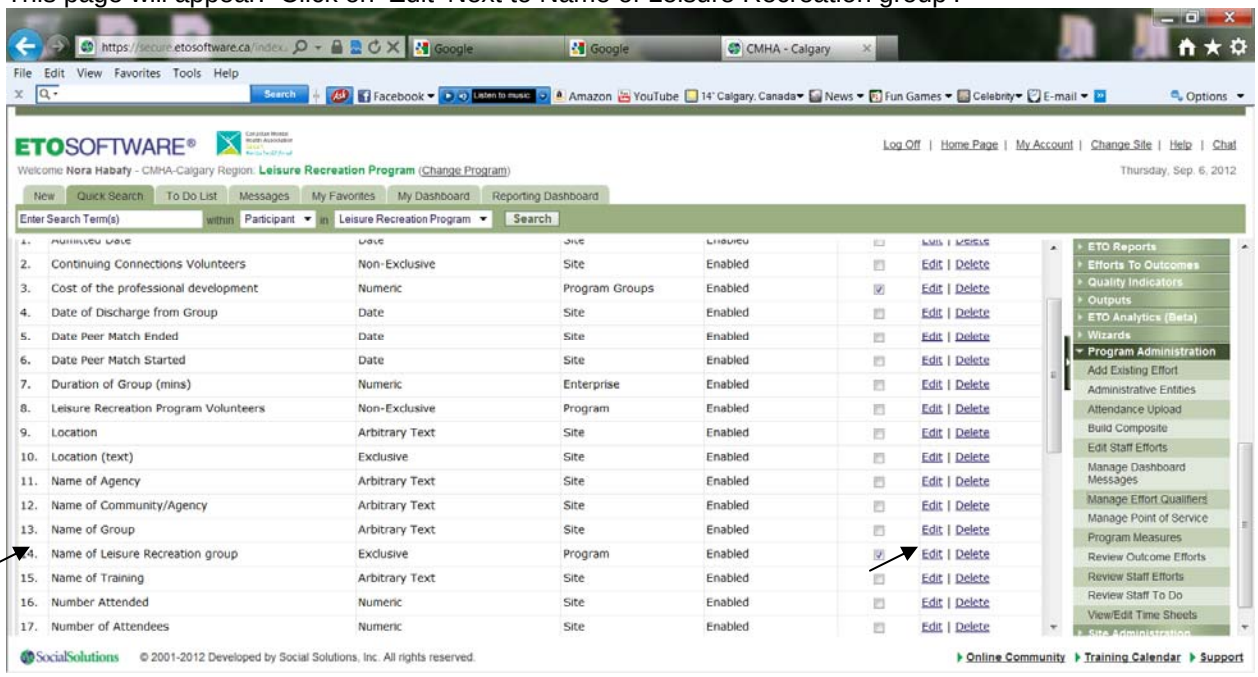


ADDING / REMOVING GROUPS IN THE LEISURE RECREATION PROGRAM

On your Navigation bar, click on Program Administration and then ‘Manage Efforts Qualifiers’



This page will appear. Click on ‘Edit’ Next to Name of Leisure Recreation group’.


ETOSOFTWARE®
Welcome Nora Habafy - CMHA-Calgary Region: Leisure Recreation Program (Change Program)
Thursday, Sep. 6, 2012
2. Continuing Connections Volunteers Non-Exclusive Site Enabled Edit | Delete
3. Cost of the professional development Numeric Program Groups Enabled Edit | Delete
4. Date of Discharge from Group Date Site Enabled Edit | Delete
5. Date Peer Match Ended Date Site Enabled Edit | Delete
6. Date Peer Match Started Date Site Enabled Edit | Delete
7. Duration of Group (mins) Numeric Enterprise Enabled Edit | Delete
8. Leisure Recreation Program Volunteers Non-Exclusive Program Enabled Edit | Delete
9. Location Arbitrary Text Site Enabled Edit | Delete
10. Location (text) Exclusive Site Enabled Edit | Delete
11. Name of Agency Arbitrary Text Site Enabled Edit | Delete
12. Name of Community/Agency Arbitrary Text Site Enabled Edit | Delete
13. Name of Group Arbitrary Text Site Enabled Edit | Delete
14. Name of Leisure Recreation group Exclusive Program Enabled Edit | Delete
15. Name of Training Arbitrary Text Site Enabled Edit | Delete
16. Number Attended Numeric Site Enabled Edit | Delete
17. Number of Attendees Numeric Site Enabled Edit | Delete
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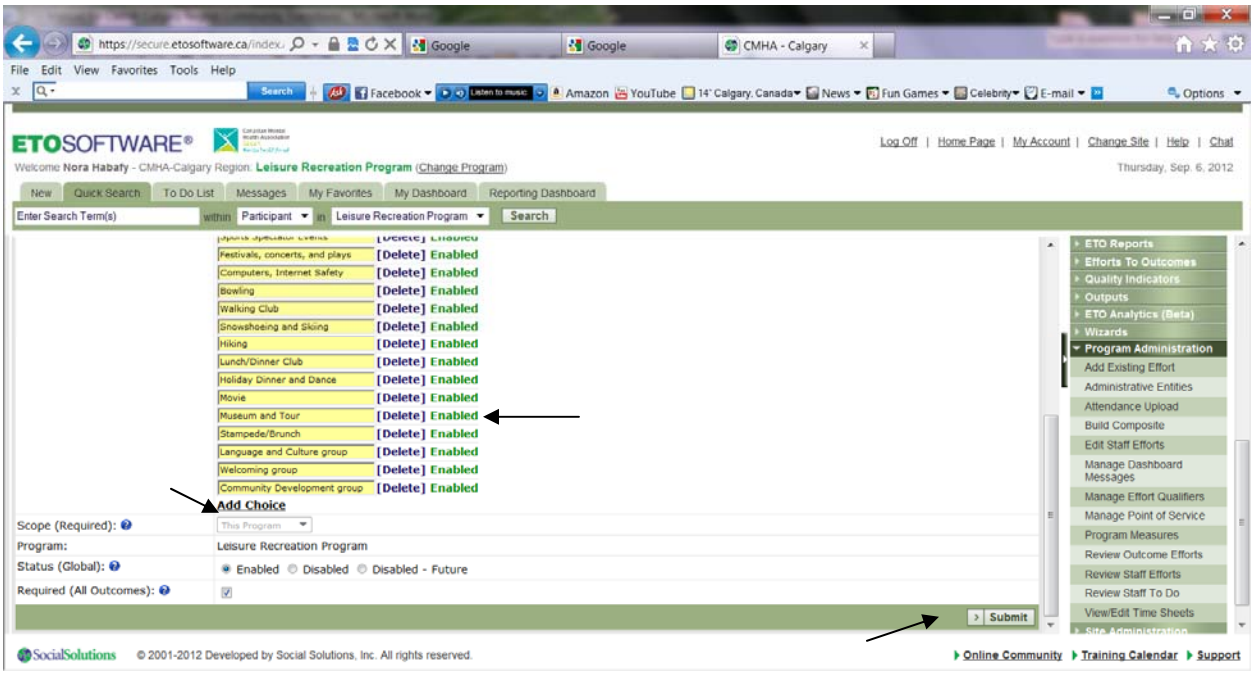
Online Community
Training Calendar
Support

The page below will appear. Click on ‘Add Choice’ to add a new group or click on ‘Enabled’ to remove a group (in case your Program is not offering this group anymore). Click on ‘Submit’.


ETOSOFTWARE
Welcome Nora Habafy - CMHA-Calgary Region: Leisure Recreation Program (Change Program)
Log Off | Home Page | My Account | Change Site | Help | Chat
Thursday, Sep. 6, 2012
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Enter Search Term(s) within Participant in Leisure Recreation Program Search
Festivals, concerts, and plays [Delete] Enabled
Computers, Internet Safety [Delete] Enabled
Bowling [Delete] Enabled
Walking Club [Delete] Enabled
Snowshoeing and Skiing [Delete] Enabled
Hiking [Delete] Enabled
Lunch/Dinner Club [Delete] Enabled
Holiday Dinner and Dance [Delete] Enabled
Movie [Delete] Enabled
Museum and Tour [Delete] Enabled
Stampede/Brunch [Delete] Enabled
Language and Culture group [Delete] Enabled
Welcoming group [Delete] Enabled
Community Development group [Delete] Enabled
Add Choice
Scope (Required):
Program: Leisure Recreation Program
Status (Global): Enabled Disabled Disabled - Future
Required (All Outcomes):
Submit
ETO Reports
Efforts To Outcomes
Quality Indicators
Outputs
ETO Analytics (Beta)
Wizards
Program Administration
Add Existing Effort
Administrative Entities
Attendance Upload
Build Composite
Edit Staff Efforts
Manage Dashboard Messages
Manage Effort Qualifiers
Manage Point of Service
Program Measures
Review Outcome Efforts
Review Staff Efforts
Review Staff To Do
View/Edit Time Sheets
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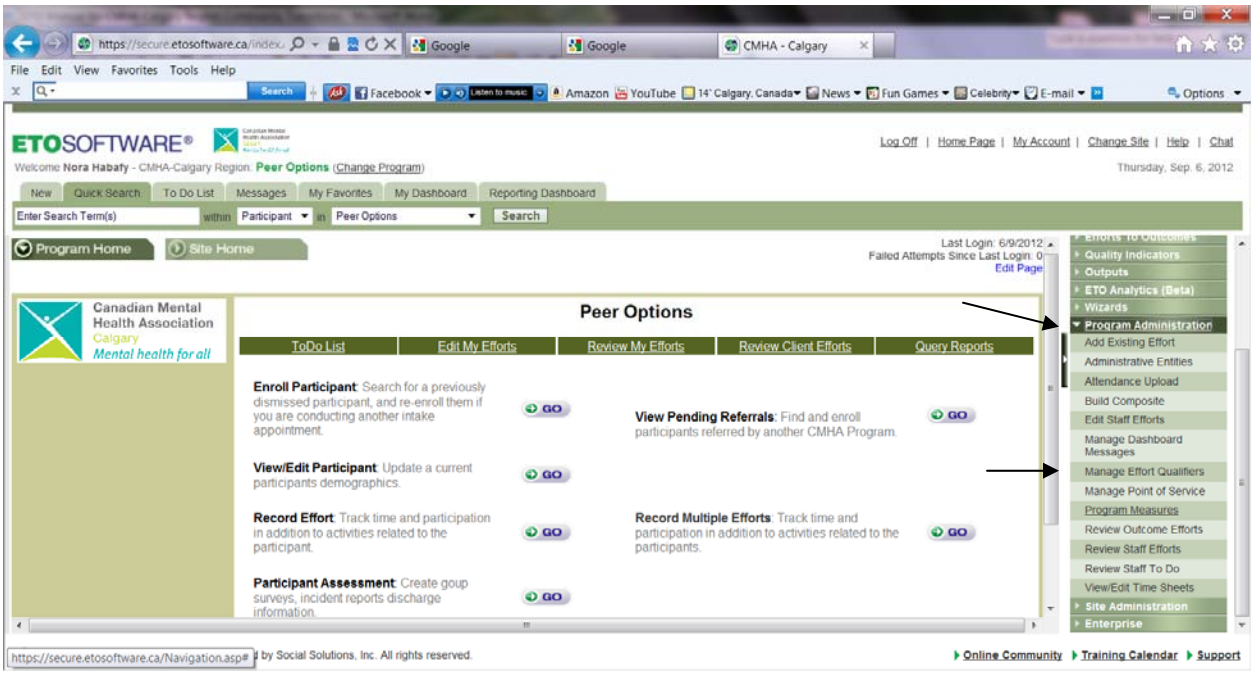
Online Community | Training Calendar | Support

ADDING/REMOVING VOLUNTEERS IN YOUR GROUPS

On your Navigation bar, click on Program Administration and then ‘Manage Efforts Qualifiers’


ETOSOFTWARE
Welcome Nora Habafy - CMHA-Calgary Region: Peer Options (Change Program)
Log Off | Home Page | My Account | Change Site | Help | Chat
Thursday, Sep. 6, 2012
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Enter Search Term(s) within Participant in Peer Options Search
Program Home
Site Home
Last Login: 6/9/2012
Failed Attempts Since Last Login: 0
Edit Page
Canadian Mental Health Association
Calgary
Mental health for all
Peer Options
ToDo List | Edit My Efforts | Review My Efforts | Review Client Efforts | Query Reports
Enroll Participant: Search for a previously dismissed participant, and re-enroll them if you are conducting another intake appointment. GO
View Pending Referrals: Find and enroll participants referred by another CMHA Program. GO
View/Edit Participant: Update a current participants demographics. GO
Record Effort: Track time and participation in addition to activities related to the participant. GO
Record Multiple Efforts: Track time and participation in addition to activities related to the participants. GO
Participant Assessment: Create goup surveys, incident reports discharge information. GO
Quality Indicators
Outputs
ETO Analytics (Beta)
Wizards
Program Administration
Add Existing Effort
Administrative Entities
Attendance Upload
Build Composite
Edit Staff Efforts
Manage Dashboard Messages
Manage Effort Qualifiers
Manage Point of Service
Program Measures
Review Outcome Efforts
Review Staff Efforts
Review Staff To Do
View/Edit Time Sheets
Site Administration
Enterprise
https://secure.etosoftware.ca/Navigation.asp#
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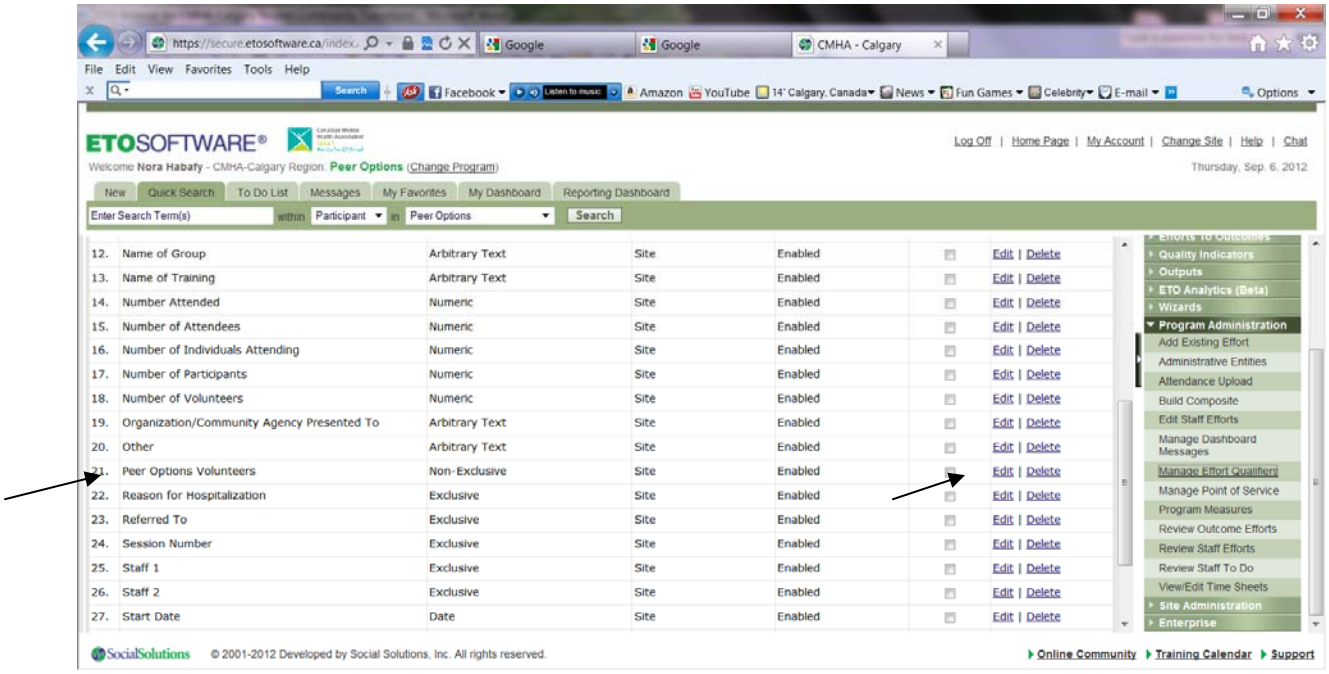
The page below will appear. Click on ‘Edit’ next to ‘Continuing Connections Volunteers’ or ‘Peer Options Volunteers’ or ‘Leisure Recreation Volunteers’.


ETOSOFTWARE®
Welcome Nora Habafy - CMHA-Calgary Region: Peer Options (Change Program)
Log Off | Home Page | My Account | Change Site | Help | Chat
Thursday, Sep. 6, 2012
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Enter Search Term(s) within Participant in Peer Options Search
12. Name of Group | Arbitrary Text | Site | Enabled | Edit | Delete
13. Name of Training | Arbitrary Text | Site | Enabled | Edit | Delete
14. Number Attended | Numeric | Site | Enabled | Edit | Delete
15. Number of Attendees | Numeric | Site | Enabled | Edit | Delete
16. Number of Individuals Attending | Numeric | Site | Enabled | Edit | Delete
17. Number of Participants | Numeric | Site | Enabled | Edit | Delete
18. Number of Volunteers | Numeric | Site | Enabled | Edit | Delete
19. Organization/Community Agency Presented To | Arbitrary Text | Site | Enabled | Edit | Delete
20. Other | Arbitrary Text | Site | Enabled | Edit | Delete
21. Peer Options Volunteers | Non-Exclusive | Site | Enabled | Edit | Delete
22. Reason for Hospitalization | Exclusive | Site | Enabled | Edit | Delete
23. Referred To | Exclusive | Site | Enabled | Edit | Delete
24. Session Number | Exclusive | Site | Enabled | Edit | Delete
25. Staff 1 | Exclusive | Site | Enabled | Edit | Delete
26. Staff 2 | Exclusive | Site | Enabled | Edit | Delete
27. Start Date | Date | Site | Enabled | Edit | Delete
Quality Indicators
Outputs
ETO Analytics (Beta)
Wizards
Program Administration
Add Existing Effort
Administrative Entities
Attendance Upload
Build Composite
Edit Staff Efforts
Manage Dashboard Messages
Manage Effort Qualifiers
Manage Point of Service
Program Measures
Review Outcome Efforts
Review Staff Efforts
Review Staff To Do
View/Edit Time Sheets
Site Administration
Enterprise
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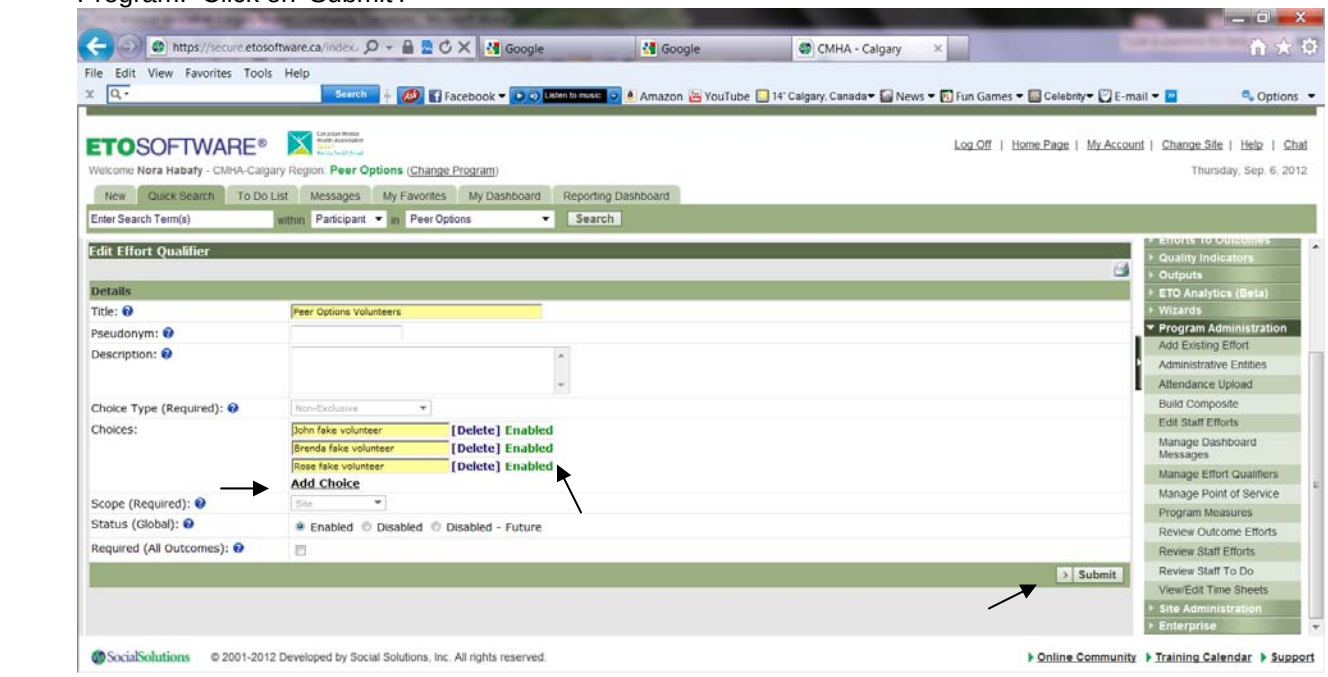
Online Community | Training Calendar | Support

Click on 'Add Choice' to add a new volunteer or click on 'Enabled' if a volunteer is no longer in the Program. Click on 'Submit'.



RECORDING AND EDITING GROUP ATTENDANCE OF REGISTERED CLIENTS – Peer Options and Continuing Connections

Feature to use: Multiple Participant Efforts

This feature is most often used to track attendance, or services provided to more than one Participant simultaneously. For example workshops and group activities.

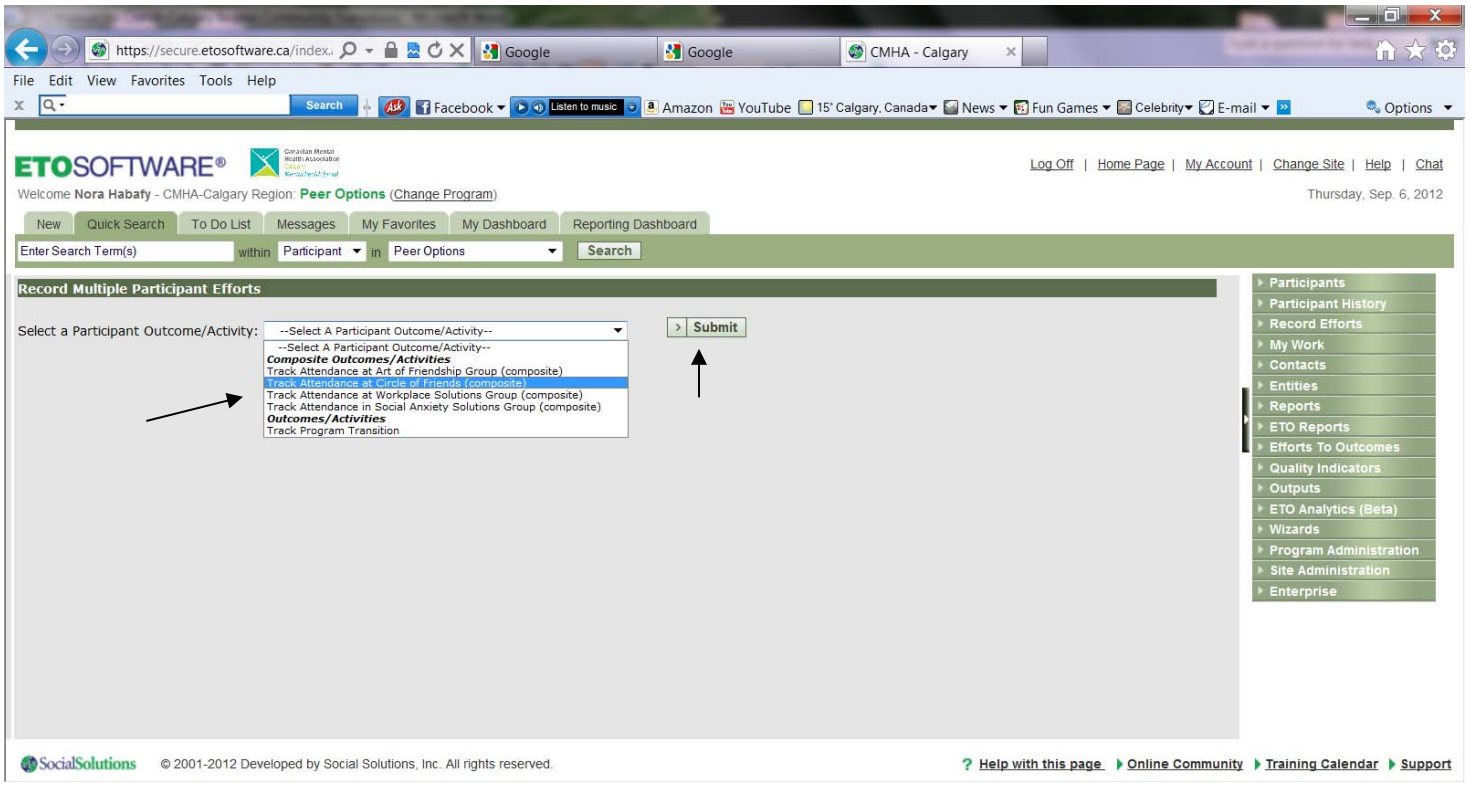
Peer Options: On your Program's Home page, click on 'Go' next to 'Record Multiple Efforts'

Continuing Connections: On your Navigation Bar, go to Record Efforts and then click on Multiple Participant Efforts You will be prompted to select Group/Family or Participant, Select the Group/Family option, then click Submit to be prompted to enter data for one of your Groups, click on the group you are interested in.

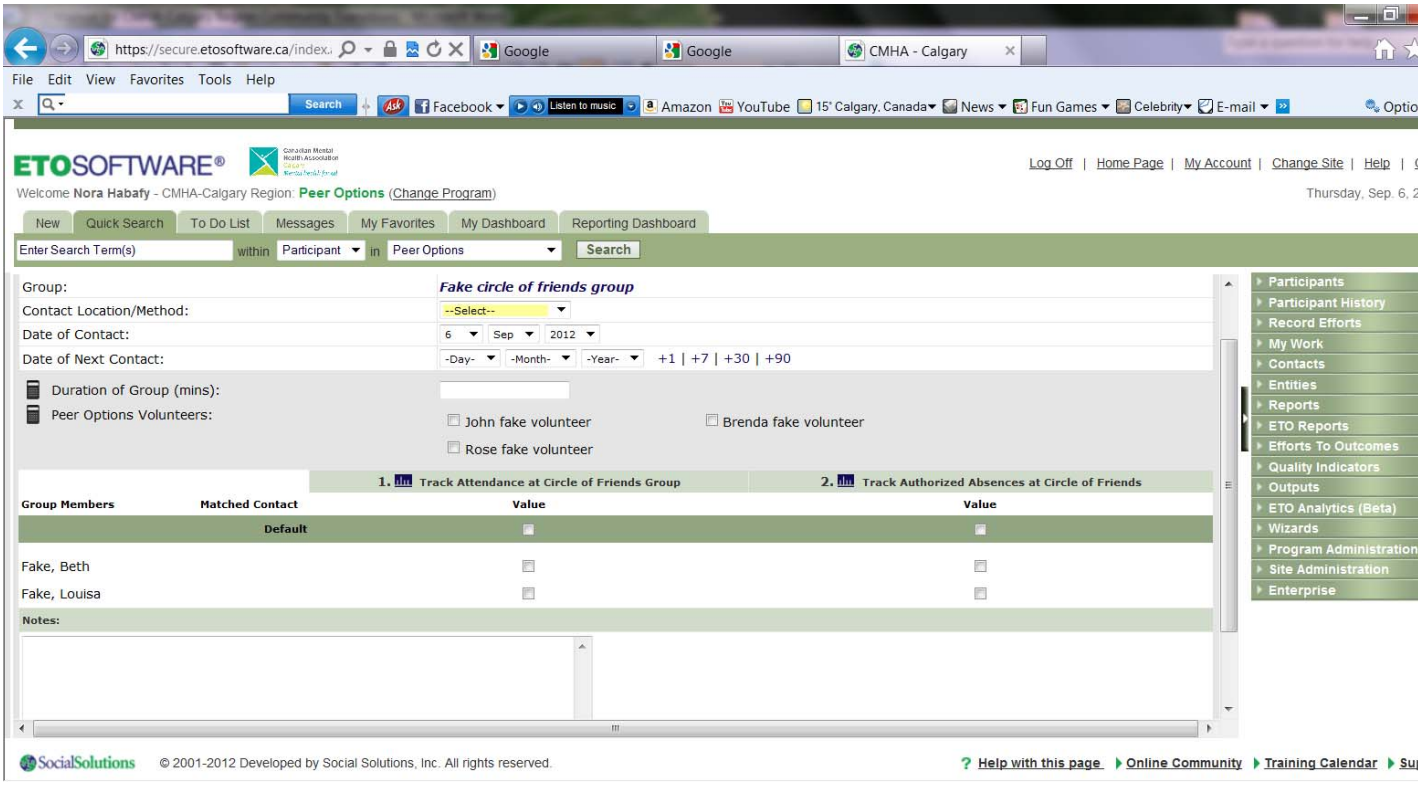
Select Group

1. Fake circle of friends group

When this page appears, select the appropriate Point of Service and click 'Submit'.



This page will appear:



- Contact Location/Method. This field is meant to capture how or where a service was provided
- Date of Contact should be the date when you actually worked with the participants, including those contacts that occurred in the past. Note that Date of Contact cannot be recorded for the future.
- No need to enter 'Date of Next Contact'.
- Time Spent on Contact is entered in **minutes**. The user account that records a Multiple Participant Effort will be credited once for the time entered for the entire group.
- If participant is present: put a checkmark, if participant is absent: leave blank. If it was an authorized absence, put a checkmark. Put a checkmark for the volunteer(s) that assisted in the facilitation of the group.
- The notes field has a limitation of 7,250 characters. The notes field box will grow and a scroll bar will appear to accommodate notes.
- Click on 'Save a record' if you have only this attendance to enter, or click on 'Save and record similar effort' if you will enter more attendances for the same group.
- To prevent duplication of efforts, a pop-up message will appear if you submit an Attendance Point of Service for the same Participant(s) on the same date. You will then have the option to bypass the message and submit the effort, or to forego submitting the effort to avoid entering a duplicate effort.

Edit My Efforts – Refer to the relevant section in this Manual regarding how to access the 'Edit My Efforts' feature (hint: It is on your Program's Home Page!)

If you have made a mistake or did not finish entering a note, the Edit my Efforts feature will allow you to go back and update the effort with changes.

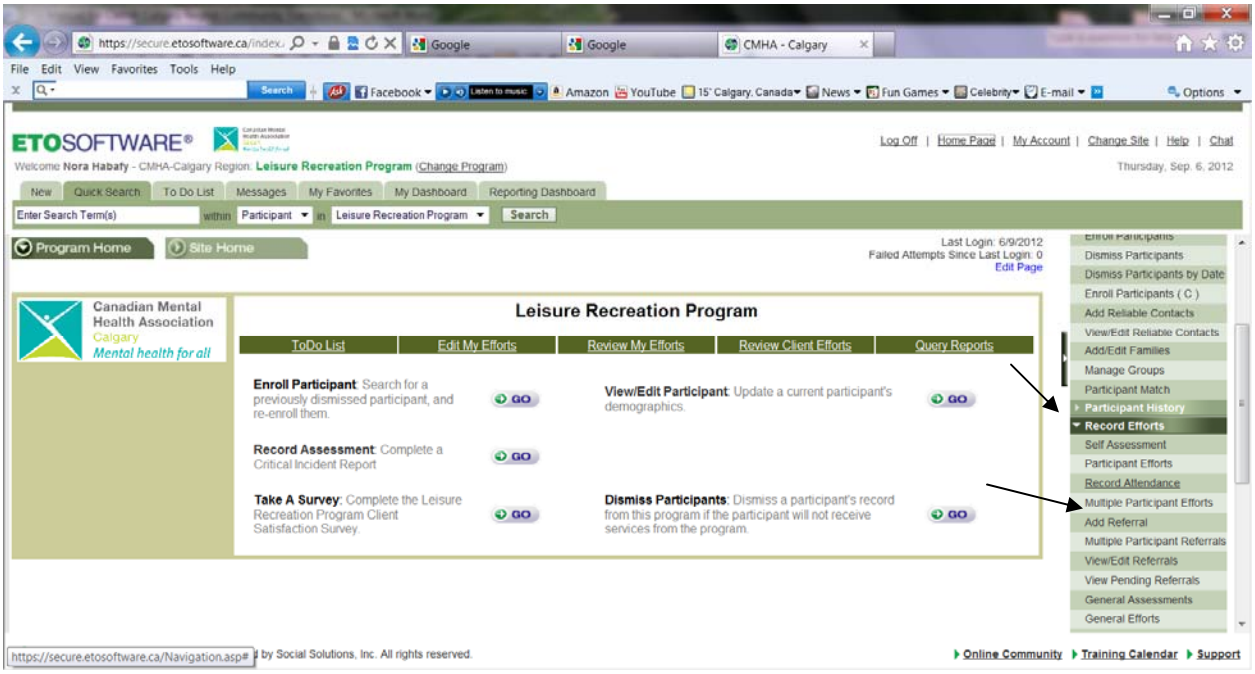
Efforts can be found based on the Date of Contact (often different than the date recorded), or by the Participants last name. For Multiple Participant Efforts, **Date of Contact is probably the better option**.

Click the blue link to edit the group record, or the red link that reads "Delete Group Record" to delete the group record. There is also a red "Delete record" link so that each participant's individual record can be deleted in case they were included in the effort inadvertently. Note that deleted records are completely erased from ETO.

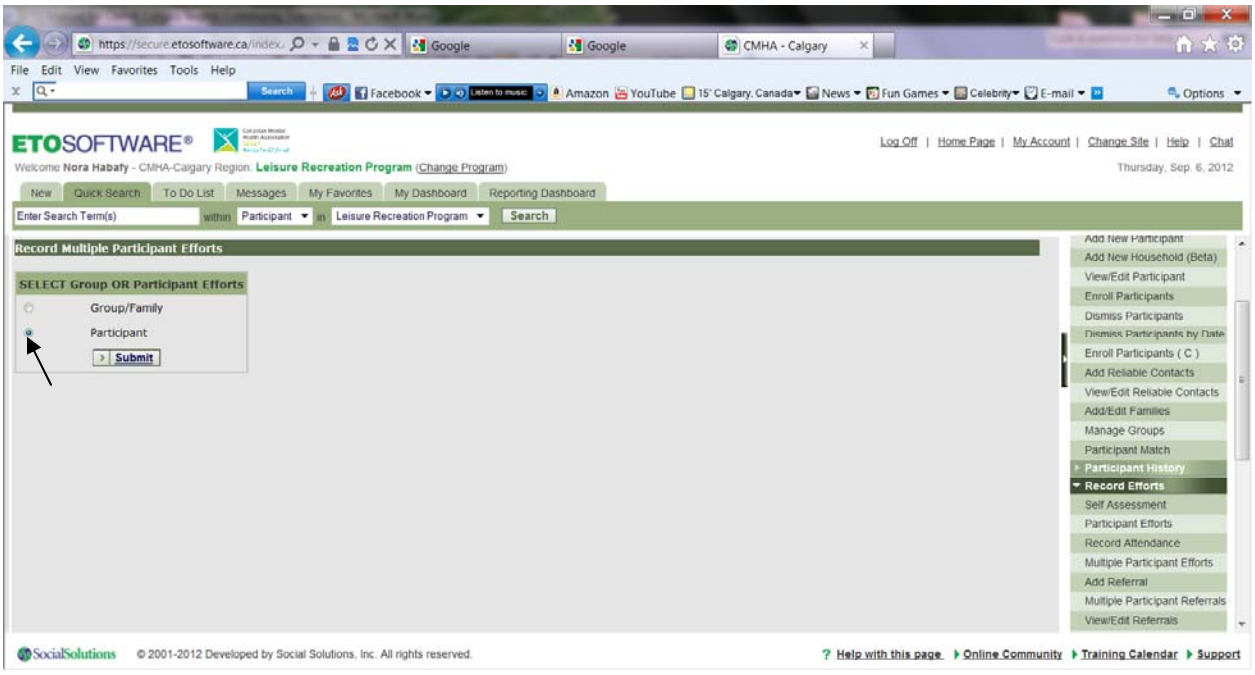
Make any needed changes and click Update Effort.

RECORDING GROUP ATTENDANCE OF UNREGISTERED CLIENTS – Leisure Recreation Program

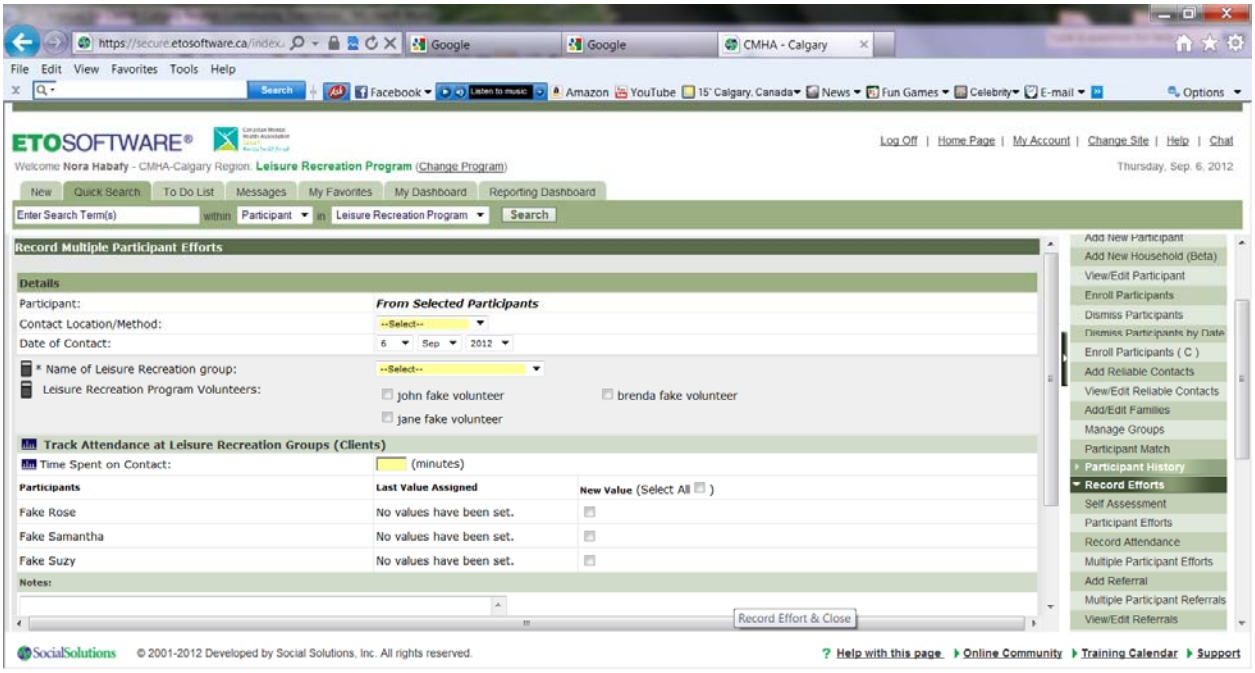
On your Navigation Bar, go to 'Record Efforts' and then click on 'Multiple Participant Efforts'.


ETOSOFTWARE®
Welcome Nora Habafy - CMHA-Calgary Region: Leisure Recreation Program (Change Program)
Log Off | Home Page | My Account | Change Site | Help | Chat
Thursday, Sep. 6, 2012
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Enter Search Term(s) within Participant in Leisure Recreation Program Search
Program Home | Site Home
Last Login: 6/9/2012
Failed Attempts Since Last Login: 0
Edit Page
Canadian Mental Health Association
Calgary
Mental health for all
Leisure Recreation Program
ToDo List | Edit My Efforts | Review My Efforts | Review Client Efforts | Query Reports
Enroll Participant: Search for a previously dismissed participant, and re-enroll them. GO
View/Edit Participant: Update a current participant's demographics. GO
Record Assessment: Complete a Critical Incident Report GO
Take A Survey: Complete the Leisure Recreation Program Client Satisfaction Survey. GO
Dismiss Participants: Dismiss a participant's record from this program if the participant will not receive services from the program. GO
Dismiss Participants
Dismiss Participants by Date
Enroll Participants (C)
Add Reliable Contacts
View/Edit Reliable Contacts
Add/Edit Families
Manage Groups
Participant Match
Participant History
Record Efforts
Self Assessment
Participant Efforts
Record Attendance
Multiple Participant Efforts
Add Referral
Multiple Participant Referrals
View/Edit Referrals
View Pending Referrals
General Assessments
General Efforts
Online Community | Training Calendar | Support

This page will appear. Click on Participant and then 'Submit'.



The name of all the clients currently enrolled in the Leisure Recreation Program will appear. Put a checkmark for all the clients **who signed up to attend the group** and click on 'Submit' at the bottom of the page.
This page will appear:


ETOSOFTWARE
Welcome Nora Habafy - CMHA-Calgary Region: Leisure Recreation Program (Change Program)
Log Off | Home Page | My Account | Change Site | Help | Chat
Thursday, Sep. 6, 2012
New | Quick Search | To Do List | Messages | My Favorites | My Dashboard | Reporting Dashboard
Enter Search Term(s) within Participant in Leisure Recreation Program Search
Record Multiple Participant Efforts
Details
Participant: From Selected Participants
Contact Location/Method: --Select--
Date of Contact: 6 Sep 2012
* Name of Leisure Recreation group: --Select--
Leisure Recreation Program Volunteers:
john fake volunteer
brenda fake volunteer
jane fake volunteer
Track Attendance at Leisure Recreation Groups (Clients)
Time Spent on Contact: (minutes)
Participants | Last Value Assigned | New Value (Select All)
Fake Rose | No values have been set.
Fake Samantha | No values have been set.
Fake Suzy | No values have been set.
Notes:
Record Effort & Close
Add New Participant
Add New Household (Beta)
View/Edit Participant
Enroll Participants
Dismiss Participants
Dismiss Participants by Date
Enroll Participants (C)
Add Reliable Contacts
View/Edit Reliable Contacts
Add/Edit Families
Manage Groups
Participant Match
Participant History
Record Efforts
Self Assessment
Participant Efforts
Record Attendance
Multiple Participant Efforts
Add Referral
Multiple Participant Referrals
View/Edit Referrals
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- Select the contact location/method
- Select the name of the Leisure Recreation group in the drop-down list ‘Name of Leisure Recreation group’
- Put a checkmark next to the name(s) of the volunteer(s) who assisted in the facilitation of the group
- Input the duration of the group in minutes
- If the client was present, put a checkmark next to his/her name and if the client was absent, leave the box blank.
- Click on ‘Save a record’ if you have only this attendance to enter, or click on ‘Save and record similar effort’ if you will enter more attendances for the same group.
- To prevent duplication of efforts, a pop-up message will appear if you submit an Attendance Point of Service for the same Participant(s) on the same date. You will then have the option to bypass the message and submit the effort, or to forego submitting the effort to avoid entering a duplicate effort.

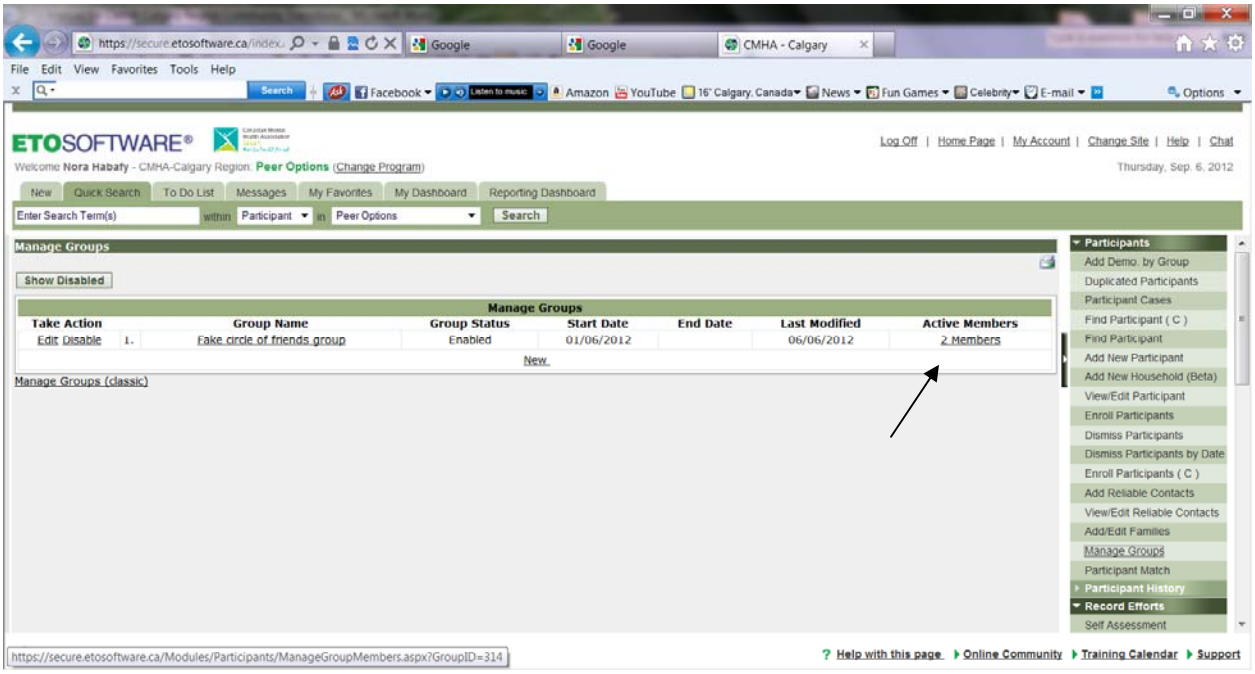
TO EDIT SOME GROUP RECORDS, REFER TO PAGE 47 IN THIS MANUAL

UN-REGISTERING CLIENTS FROM GROUPS

This is for when one or multiple participants leave the group.

Go to Manage Groups on your Home Page or on your Navigation Bar go to ‘Participants’ and then ‘Manage Groups’.

Click on “x Members’ under ‘Active Members’.

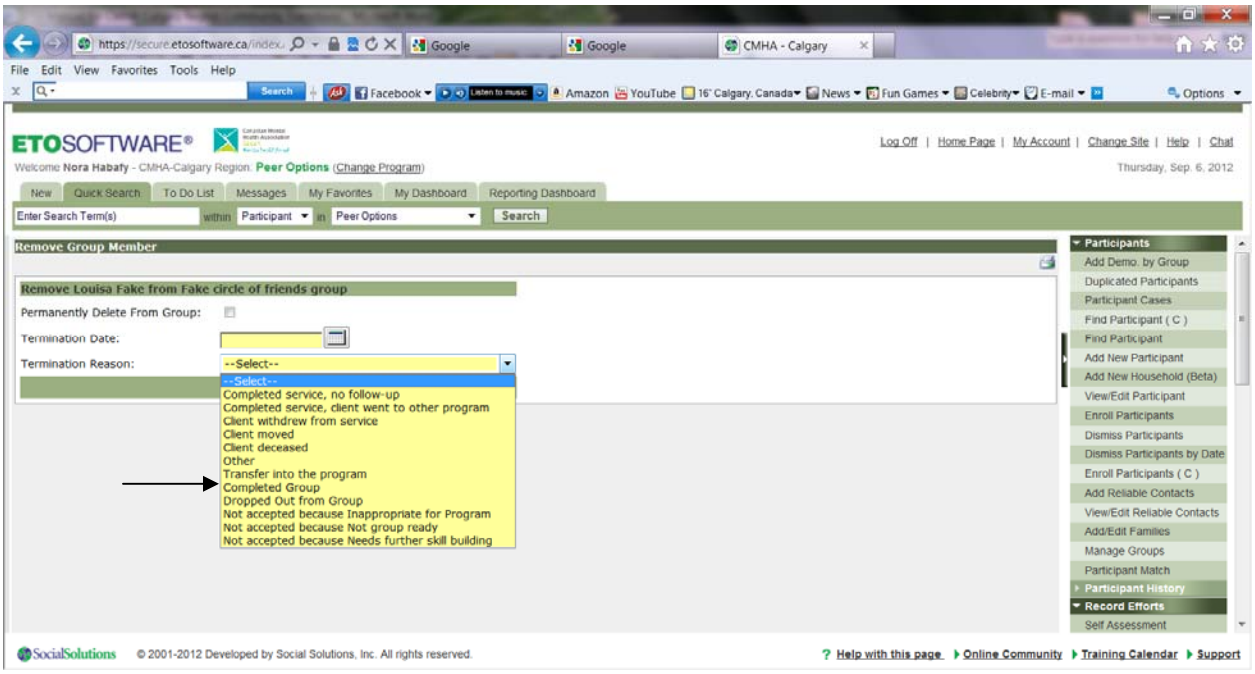


Click on 'Remove' next to each participant's name:

Participants in Fake circle of friends group:

Take Action	Participant Name	Group Start Date
Edit Remove	Fake, Beth	06/06/2012
Edit Remove	Fake, Louisa	06/06/2012

This page will appear:



- Input the ‘Termination Date’
- For Termination Reason: ***** Only use the options ‘Completed Group’, ‘Dropped out from Group’ and ‘Other’ because all the other options do not apply to Groups (Indeed, the other options are for discharge from a Program or not accepted in the Peer Options Program)*****
- Click on ‘Save’

LOGGING OFF

To log off, click on the link in the upper right corner of the software. You should click on this link before closing your browser to ensure the data remains as secure as possible.